



WILBANKS PARTNERS

Wilbanks Partners, llc

Diversity Recruiting

Wilbanks Partners, LLC
One Stamford Plaza, 9th Floor
263 Tresser Boulevard
Stamford, CT 06901

www.wilbankspartners.com

May 2022

Leadership In Diversity Recruiting

Wilbanks Partners LLC is a leader in Diversity Recruiting, having led major initiatives in this area in the last decade at three major investment firms. The results were both in the "C" Suite, including a Chief Investment Officer, the Heads of Distribution for two different firms, as well as multiple placements at the investment analyst and portfolio manager level for another major East Coast suburban investment company.

- Outstanding track record of success recruiting diversity candidates to leadership roles, as about 50% of our successful candidates since 2011 have represented diverse cohorts.
- Guarantee a diverse slate, but measure success only through the final hire.
- Work closely with the management team to minimize unconscious bias and counterproductive micro-messaging in the recruiting process.
- Sourcing networks include contacts from over two decades of relationship building with diversity cohort organizations such as NASP, OUT Leadership, Wall Street Women's Alliance, Toigo Foundation, etc.
- Extensive public speaking and publishing track record on the topic (see our blogs, "[Building a Diverse Workforce in the Investment Business](#)," July 2016, and "[Unconscious Bias in New Hire Compensation — Profitability Expectations vs. Gender Pay Bias](#)," November 2018).
- Hosted Women's Leadership Forum of 80 female CEOs from 11300 firms from 2013-2015.

Selected Representative Diversity Recruitments

Asset & Wealth Management

Board of Directors

Major Independent Investment Firm
Member, Board of Directors
Global Public Investment Mgmt Firm
Member, Board of Directors
Large Mutual Fund
Independent Trustee (3)
Major Financial Services Industry
Association
Member, Board of Directors

CEO / COO

Major Family Office
Chief Executive Officer
Large Family Office
President & CEO

Corporate Officers

Major Independent Investment Firm
Head of International Audit
Major Wealth Management Firm
MD & Chief Risk Officer
Mid-Sized Global Investment Manager
Director of Human Resources
Mid-sized Independent Investment
Manager
Chief Human Resources Officer

Chief Investment Officer

Major Regional Bank
CIO – Investment & Wealth Mgmt
Significant UHNW Boutique Private Bank
Chief Investment Officer
Major Pension Fund
Director of Alternative Investments
Major Community Foundation
Chief Investment Officer
Large Family Office
Director of Investments
Large Family Office
*Head of Investments & Portfolio
Administration*

Equities

Major Independent Mutual Fund Firm
MD & Head of Quant. Equity Investing
Sr. Quantitative Research Analyst (3)
Global Macro Economist (2)

Fixed Income

Large International Insurance Company
Senior Credit Portfolio Manager
Senior Credit Research Analyst

Technology and Operations

Major Independent Investment Firm
*EVP, Operations & Implementation,
Retirement Business*
Middle Office Software Company
Product Manager

Institutional Sales & Marketing

Major Independent Investment Firm
*EVP & Division Executive,
Defined Benefits Administration*
Leading ESG Investment Firm
SVP & Head of Pension Sales
Mid-Size Global Equity Manager
*Partner & Head of Marketing and Client
Service*
Major Investment Firm
VP & Chief Marketing Officer – Inst'l
Investment Analytics Software Company
Head of Sales
Major Global Asset Management Firm
*Senior Institutional Equity Sales
Specialist & Client Portfolio Manage*

Retail Sales & Marketing

Leading ESG Investment Firm
EVP & Head of Distribution
Head of Internal Sales Desk
Major Global Asset Management Firm
SVP & Head of Retail Marketing
Major Investment Firm
VP & Chief Marketing Officer – Retail
Major Global Asset Management Firm
SVP – Digital Marketing
Major Investment Management Firm
*Director & Chief Marketing Officer –
Digital and Social Media*
Significant UHNW Boutique Private Bank
*Managing Director & Head of Client
Service*

Diversity Search Strategies

- “The only measure of diversity recruiting success is in the final hire.”
- Write and audit job descriptions carefully, avoiding biased language.
- Introduce diversity cohorts in the jury early in the interview process and make sure all jury members are aligned in messaging.
- Work closely with jury members on interview techniques and recruiting processes to minimize unconscious bias and counterproductive micro-messaging.
- Specifically target sourcing and referencing initiatives toward diverse cohorts early in the search process. See the following list of associations with which we maintain frequent contact or of which we are a supporting member, including attendance at association conferences and speaking engagements.

Wilbanks Partners Diversity Cohort Association Relationships

[100 Women in Finance / 100 Women in Hedge Funds](#)

[Ascend](#)

[Asian American Insurance & Financial Professional Assoc.](#)

[Asian Women in Business \(AWIB\)](#)

[Association of African American Financial Advisors](#)

[Association of Asian American Investment Managers](#)

[Association of Black Foundation Executives \(ABFE\)](#)

[Association of Latino Professionals for America \(ALPFA\)](#)

[CEOAction / Black Corporate Directors Conference](#)

[CFA Institute's Driving Change Initiative](#)

[CFA Institute's Women in Investment Mgmt Initiative](#)

[Council of Urban Professionals](#)

[Disability:IN](#)

[Diverse Corporate Directors Coalition \(DCDC\)](#)

[The Diversity Project](#)

[Effective Leadership Council](#)

[Ellevest Network](#)

[Financial Women's Association](#)

[Girls Who Invest](#)

[Girls with Impact](#)

[The Global Impact Investing Network \(GIIN\)](#)

[INROADS](#)

[Invest in Girls](#)

[INvolve](#)

[JumpStart Advisory Group](#)

[JUST Capital](#)

[Latino Corporate Directors Association \(LCDA\)](#)

[Management Leadership for Tomorrow \(MLT\)](#)

[MMI Gateway to Leadership / Gateway Foundation](#)

[National Association of Asian MBAs \(NAAMBA\)](#)

[National Association of Securities Professionals \(NASP\)](#)

[National Black MBA Association \(NBMBA\)](#)

[Native American Finance Officers Associates \(NAFOA\)](#)

[Neythri](#)

[NICSA Diversity Project North America](#)

[OUT Leadership / Quorum](#)

[The Partnership, Inc.](#)

[The Robert Toigo Foundation](#)

[SOCAP Global](#)

[South Asian Women's Professional Network \(SAWPN\)](#)

[Sustainability Accounting Standards Board \(SASB\)](#)

[TiE Global \(The IndUS Entrepreneurs\)](#)

[UN Principles for Responsible Investment Initiative](#)

[US Sustainable Investment Forum \(US SIF\)](#)

[Wall Street Bound](#)

[Wall Street Women's Alliance \(WSWA\)](#)

[Women Corporate Directors](#)

[Women in ETFs](#)




























[Year Up](#)

[Zolio Women's Investment Competition](#)



Diversity Search Strategies

- Recognize where there is opportunity, for certain functions have more diversity, and certain diverse cohorts are more open to change than others.

	Board of Directors	CEO / COO	CIO	Portfolio Manager / Analyst	Corporate Officers*	Institutional Sales	Retail Sales	Retail Marketing	Tech & Ops
Size of Candidate Pool									
Size of Diversity Pool									
Ease of Recruitment									

** Corporate Officers include finance, administration, legal, risk/compliance, and human resources functions.*