



INCOME RESEARCH + MANAGEMENT



TWO MINUTES WITH...

ALLISON WALSH, CFA
HEAD OF ESG AND CORPORATE SUSTAINABILITY

What is your role at IR+M?

I love my role as the Head of ESG and Corporate Sustainability, which allows me to work closely with IR+Mers across the firm. I'm also able to talk extensively about my favorite subject, ESG and sustainability, with our engaged clients. As the Co-Chair of the ESG Committee and Chair of the Sustainability Committee, I collaborate with an energetic team that educates our colleagues and creates fun sustainability challenges.

Why did you choose IR+M?

After spending years at a larger company, I decided I needed a change. IR+M offered me the chance to grow in my career at a firm that genuinely focused on its clients, employees, and community. At IR+M, we really work hard to find people's geniuses. We have a small firm feel, and can make fast, but well-informed, decisions. If someone has an idea, and it's a good one, we can often act on it. Our entrepreneurial vibe is pervasive and makes for an exciting place to work.

Describe your career path. How has it evolved at IR+M?

Before joining IR+M five years ago, I spent over 10 years at a large insurance company. I joined that organization right out of college as a customer service representative. It was a fast-paced environment. Everything was carefully monitored – customer interactions, call metrics, and even our breaks. I eventually migrated to the portfolio management team, where I was responsible for asset-liability management. I learned about cross-functional coordination, which can be challenging at a large company. At IR+M, I've had two different roles. Initially, I worked as a Client Portfolio Manager, which allowed me to dig into the fixed income market in a very nuanced way. I became very passionate about ESG, and how we could integrate those factors into our investment process. That interest led me to the Investment Product Management Team and my current position as the Head of ESG and Corporate Sustainability. It's been exciting to watch our firm grow in this space.

- + INDEPENDENT FIRM
- + VALUE ORIENTED APPROACH
- + CLIENT FOCUS
- + COLLABORATIVE CULTURE



Get to know Allison

What do you do in your free time?

With 2-year-old twins and a 7-year-old prankster, I don't have much free time these days. I love to run and be active. During the pandemic, I've been able to complete several virtual races, including a half marathon and 10-miler. My good intentions to properly train are often sidetracked, but I find a way to get out the miles. I'm optimistic that someday, I'll add an eighth Boston marathon to my resume!

How are you incorporating ESG into your life?

At home, we've been focused on ways to make ourselves greener. We purchased an electric vehicle, which helps mitigate greenhouse gases. We've reduced our use of plastics, opted for bamboo diapers, traded toothpaste for zero-waste toothpaste bites, and contracted for compost pick up.

How has it been working from home?

I've been pleasantly surprised by the many benefits of working from home. I definitely don't miss my commute, which often involved me sprinting through the financial district at rush hour to catch my train. At least I was able to get in some exercise that way! Of course, the downside of working remotely is that I miss my awesome colleagues. You take for granted the little conversations you have throughout the day. I readily accept and initiate invitations for virtual coffees and after-work cocktails. These interactions always lift my spirits and remind me how fortunate I am to work at such a special place.

All information as of 4/1/21. The views contained in this presentation are those of IR+M and are based on information obtained by IR+M from sources that are believed to be reliable. This report is for informational purposes only and is not intended to provide specific advice, recommendation for, or projected returns of any particular IR+M product. No part of this material may be reproduced in any form, or referred to in any other publication, without express written permission from Income Research & Management.