

CWIM LEADER SPOTLIGHT



Kathleen Walters, CFA

Director, PFM Asset Management LLC

CFA Society Milwaukee

WHAT IS YOUR CURRENT JOB TITLE / COMPANY AND WHAT DO YOU LIKE THE MOST ABOUT YOUR ROLE?

I am a Director at PFM Asset Management / US Bank Asset Management. What I love most about my job is my clients. I work with public and nonprofit clients that are doing incredible work in our communities. I feel that by supporting them, we are helping serve a greater good.

WHAT MOTIVATED YOU TO JOIN / SUPPORT THE COLLABORATIVE WIM INITIATIVE?

It only took me 5 years of working in finance to understand hard work and passion for investing alone was not enough for women to be successful in this industry. When my friend, Katia Frock, launched a Women's group at my firm, I signed on to be the Vice Chair and then Chair. The Network provided connections, built relationships, offered mentorship and support, hosted educational programming, ran fundraisers, and got people involved. When I saw the women launch the Collaborative WIM Initiative, with so many of the same goals, I knew I had to join.

DESCRIBE YOURSELF USING 3 WORDS.

Ambitious, nerdy, sincere.

WHAT IS YOUR ROLE WITH YOUR CFA SOCIETY? WHAT HAS BEEN THE MOST REWARDING EXPERIENCE FOR YOU?

I am a board member for the CFA Society of Milwaukee. I joined the board in 2020. Over the few short years, I've been so impressed by the dedication of my fellow board members. Their commitment to the CFA during such an unusual time has been remarkable to watch.

WOULD YOU RATHER LIVE IN A BIG CITY OR ON A FARM?

An urban farm—I'm a city girl obsessed with gardens.

WHAT'S THE WORST THING YOU'VE EVER EATEN, OUT OF COURTESY?

When I lived in Singapore for a summer, a lovely family hosted my program class for dinner and served durian as dessert. It was both curiosity and politeness that had me trying the pungent desert. I enjoyed it more than I would have guessed based on its scent.

HOW DO YOU LIKE TO DE-STRESS?

When I'm stressed, I take on projects or new hobbies. Some of my favorite distractions include running, golf, reading, cooking, gardening, photography, and watching movies. The intensity of each project perfectly correlates with the amount of stress I feel. I am completely incapable of sitting still to relax.