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# Invesco Ltd.

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## Introduction

Invesco Ltd. stands today as one of the world's leading independent investment management firms—a global force headquartered in Atlanta, Georgia, with a presence extending across six continents. The journey of Invesco from a small, regional investment advisor to a powerhouse with trillions in assets under management encapsulates the story of modern finance: waves of innovation, periods of crisis and recovery, relentless competition, and a commitment to serving clients in a complex, ever-changing world.

This book was written to chronicle the story of Invesco Ltd., tracing its humble beginnings in the heart of the American South during the Great Depression to its present status as an S&P 500 mainstay and one of Wall Street's most influential asset managers. Through this journey, we'll explore how waves of change—be they in market structure, technology, demographics, or public policy—shaped the company's destiny. What emerges is not just a narrative about one firm but about the evolution of financial services, the globalization of capital, and the transformation of individual and institutional investor needs.

The history of Invesco is one of constant reinvention and adaptation. From its founding as Investment Counsel, Inc., with an initial focus on real estate and advisory services, to its pioneering moves into Asia-Pacific in the 1960s, through cycles of acquisitions and rebranding, and its embrace of alternative investments and ETFs, Invesco exemplifies how a legacy business can reinvent itself to stay relevant. Strategic mergers—notably the formation of AMVESCAP—large-scale acquisitions, and timely pivots into fast-growing markets became hallmarks of Invesco's expansion.

Yet the story of Invesco is not merely a financial or strategic one. The firm's commitment to ethical stewardship, responsible investing, and its efforts around diversity, equity, and inclusion have been central to its identity. Its initiatives to foster community support, promote ESG standards, and cultivate a diverse workforce and leadership team signal a broader understanding that lasting success in finance requires both innovation and integrity. Invesco's social responsibility programs and integration of environmental, social, and governance factors reveal an organization striving to create value not only for clients and shareholders but for society at large.

This book also assesses the company's current standing and the growing challenges and opportunities facing investment managers in the twenty-first century. The rise of passive investing, the boom in private alternatives, advancements in data analytics and artificial intelligence, a volatile regulatory landscape, and the competitive need for scale have all influenced Invesco's recent strategies. We will delve into the ways

Invesco has responded to these shifts, strengthened its financials, and shaped its operational focus to sustain growth and innovation.

By looking back at nearly a century of Invesco's evolution and forward to its prospects in a rapidly changing world, this book seeks to offer readers a comprehensive portrait of both the company and the dynamic industry it inhabits. Whether you are an investor, a student of business, a financial professional, or simply curious about how institutions endure and adapt, Invesco Ltd.: The Story of An American Company aims to inform, engage, and inspire.

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## **CHAPTER ONE: The Genesis of Invesco: Founding Years (1935-1959)**

The year 1935 was etched into the annals of American history as the Great Depression continued its relentless grip on the nation. Factories lay silent, unemployment soared, and the once-vibrant economic landscape resembled a barren wasteland. Yet, amidst this widespread despair, a different kind of seed was being planted in Atlanta, Georgia. It was in this environment that Charles Dexter McCoy, a man with a clear vision for financial guidance, founded Investment Counsel, Inc. His ambition was not merely to navigate the turbulent waters of the financial markets but to build a company dedicated to providing sound investment advisory services, offering a beacon of hope to individuals and institutions alike.

McCoy's initial foray into the investment world had a particular focus: real estate. In an era where trust in traditional financial institutions was at an all-time low, the tangible nature of real estate offered a reassuring sense of security. This early emphasis on property investments would prove to be a foundational element, laying the groundwork for Invesco's future diversification and growth. The firm aimed to provide expert advice, helping clients make informed decisions in a market that demanded both caution and foresight.

Investment Counsel, Inc. started as a relatively humble operation, a testament to the entrepreneurial spirit that often emerges during times of adversity. The company's focus on advisory services meant building relationships based on trust and a deep understanding of each client's unique financial situation. This client-centric approach, established from the very beginning, would become a defining characteristic of the firm as it expanded over the decades.

As the nation slowly began to emerge from the shadow of the Depression, Investment Counsel, Inc. steadily built its reputation. The principles of careful analysis and long-term planning, championed by McCoy, resonated with a populace eager for stability and reliable financial stewardship. The success of the firm was not measured in fleeting market gains but in the sustained growth and security it offered to its clients.

The 1940s brought global conflict with World War II, further impacting the economic landscape. Despite the challenges, Investment Counsel, Inc. continued its work, adapting to the shifting priorities and investment opportunities of a wartime economy and the subsequent post-war boom. The firm's ability to navigate these complex periods, always with an eye on its core mission of client service, solidified its position in the emerging investment advisory sector.

The post-war era ushered in a period of unprecedented economic expansion in the United States. As prosperity returned, so did a renewed interest in investment. More individuals and institutions began seeking professional guidance to manage their newfound wealth and plan for the future. Investment Counsel, Inc., with its established expertise and reputation, was well-positioned to capitalize on this growing demand.

By the late 1950s, the company had experienced significant organic growth. Its initial focus on real estate had broadened, and its advisory services were sought after by an increasingly diverse client base. The firm was becoming a recognized entity in Atlanta's financial community, a testament to the vision and perseverance of Charles Dexter McCoy.

The year 1959 marked a significant turning point in the company's early history. To reflect an expanding reach and a new strategic affiliation, Investment Counsel, Inc. underwent a name change, becoming Citizens & Southern Investment Counseling, Inc. This rebranding signified a crucial step in the firm's evolution, linking its identity with Citizens & Southern National Bank. This affiliation provided access to a wider network and additional resources, propelling the company toward its next phase of growth. The new name not only broadened the company's perceived scope but also hinted at a more institutional presence, moving beyond its foundational, more localized roots. This strategic alignment with a prominent banking institution was a clear signal of the company's burgeoning influence and its ambition to serve a broader market.

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