

# Finding Aid to The HistoryMakers® Video Oral History with Valerie Mosley

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## Overview of the Collection

<b>Repository:</b>	The HistoryMakers®1900 S. Michigan Avenue Chicago, Illinois 60616 info@thehistorymakers.com www.thehistorymakers.com
<b>Creator:</b>	Mosley, Valerie, 1960-
<b>Title:</b>	The HistoryMakers® Video Oral History Interview with Valerie Mosley,
<b>Dates:</b>	August 19, 2017
<b>Bulk Dates:</b>	2017
<b>Physical Description:</b>	6 uncompressed MOV digital video files (3:06:00).
<b>Abstract:</b>	Financial executive Valerie Mosley (1960 - ) served as a portfolio manager for Wellington Management Company and became founder and CEO of Valmo Ventures, Inc. Mosley was interviewed by The HistoryMakers® on August 19, 2017, in Martha's Vineyard, Massachusetts. This collection is comprised of the original video footage of the interview.
<b>Identification:</b>	A2017_136
<b>Language:</b>	The interview and records are in English.

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## Biographical Note by The HistoryMakers®

Financial executive Valerie Mosley was born on February 5, 1960 in Tuskegee, Alabama to Clara Mosley and Clarence Mosley. Mosley earned her B.A. degree in history from Duke University in Durham, North Carolina in 1983. She received her M.B.A. degree in finance from the University of Pennsylvania's Wharton School of Finance in Philadelphia, Pennsylvania in 1986. Mosley worked as a commercial lending officer at Chase Manhattan Bank until she enrolled at the University of Pennsylvania in Philadelphia, Pennsylvania in 1984. Upon her graduation from the University of Pennsylvania, Mosley worked in institutional bond sales at Kidder, Peabody, and Company until 1990. She then joined P.G. Corbin Asset Management, Inc. as a chief investment officer and portfolio manager. In 1992, Mosley left the firm to join Wellington Management Group, where she worked as a portfolio manager, investment strategist, and senior vice president during her twenty-year career with the company. As a fixed income portfolio manager, she oversaw a \$9 billion portfolio and joined the company's Core Bond Strategy Group and Industry Strategy Group, which handled \$20 billion in fixed income portfolios for corporate and public pension funds, endowments, and mutual funds. In 2005, Mosley was appointed partner at Wellington Management Company, LLP. After leaving the company in 2012, Mosley founded Valmo Ventures, Inc., which specialized in trend identification, global wealth management, and corporate advisory. Mosley also founded Heart Beings, a blog devoted to positive articles, informative interviews, and financial advice.

Mosley served on President Barack Obama's Board of Advisors on Historically Black Colleges and Universities. Mosley also served on the Federal Reserve Bank of Boston's Advisory Board for Diversity, as president of the Wharton Alumni Club of Atlanta, and as director of The Eaton Vance Fund. Mosley was also named as one of the "50 Most Powerful Women in Business" in 2006, as one of the "Top 75 Blacks on Wall Street" by *Black Enterprise* in 2011, and one of the "Top 50 African Americans on Wall Street" by *Black Enterprise* magazine.

Mosley has three children: Taylor, Ryan, and Amanda.

Valerie Mosley was interviewed by *The HistoryMakers* on August 19, 2017.

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# Scope and Content

This life oral history interview with Valerie Mosley was conducted by Harriette Cole on August 19, 2017, in Martha's Vineyard, Massachusetts, and was recorded on 6 uncompressed MOV digital video files. Financial executive Valerie Mosley (1960 - ) served as a portfolio manager for Wellington Management Company and became founder and CEO of Valmo Ventures, Inc.

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# Restrictions

## Restrictions on Access

Restrictions may be applied on a case-by-case basis at the discretion of The HistoryMakers®.

## Restrictions on Use

All use of materials and use credits must be pre-approved by The HistoryMakers®. Appropriate credit must be given. Copyright is held by The HistoryMakers®.

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# Related Material

Information about the administrative functions involved in scheduling, researching, and producing the interview, as well as correspondence with the interview subject is stored electronically both on The HistoryMakers® server and in two databases maintained by The HistoryMakers®, though this information is not included in this finding aid.

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# Controlled Access Terms

This interview collection is indexed under the following controlled access subject terms.

## Persons:

Mosley, Valerie, 1960-

Cole, Harriette (Interviewer)

Hickey, Matthew (Videographer)

## Subjects:

African Americans--Interviews

Mosley, Valerie, 1960- --Interviews

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# Organizations:

HistoryMakers® (Video oral history collection)

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## The HistoryMakers® African American Video Oral History Collection

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### Occupations:

Financial Executive

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### HistoryMakers® Category:

BusinessMakers

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## Administrative Information

### Custodial History

Interview footage was recorded by The HistoryMakers®. All rights to the interview have been transferred to The HistoryMakers® by the interview subject through a signed interview release form. Signed interview release forms have been deposited with Jenner & Block, LLP, Chicago.

### Preferred Citation

The HistoryMakers® Video Oral History Interview with Valerie Mosley, August 19, 2017. The HistoryMakers® African American Video Oral History Collection, 1900 S. Michigan Avenue, Chicago, Illinois.

### Processing Information

This interview collection was processed and encoded on 5/30/2023 by The HistoryMakers® staff. The finding aid was created adhering to the following standards: DACS, AACR2, and the Oral History Cataloging Manual (Matters 1995).

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## Other Finding Aid

A Microsoft Access contact database and a FileMaker Pro tracking database, both maintained by The HistoryMakers®, keep track of the administrative functions involved in scheduling, researching, and producing the interview.

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## Detailed Description of the Collection

### Series I: Original Interview Footage

Video Oral History Interview with Valerie Mosley, Section A2017\_136\_001\_001, TRT: 1:35:15 ?

Video Oral History Interview with Valerie Mosley, Section A2017\_136\_001\_002, TRT: 2:31:43 ?

Video Oral History Interview with Valerie Mosley, Section A2017\_136\_001\_003, TRT: 3:35:40 ?

Video Oral History Interview with Valerie Mosley, Section A2017\_136\_001\_004, TRT: 4:28:01 ?

Video Oral History Interview with Valerie Mosley, Section A2017\_136\_001\_005, TRT: 5:31:16 ?

Video Oral History Interview with Valerie Mosley, Section A2017\_136\_001\_006, TRT: 6:24:05 ?