



Diversity, Equity & Inclusion: The “S” in ESG Takes Center Stage:
DEI 2.0 and Beyond

AIMSE 45th Annual Conference

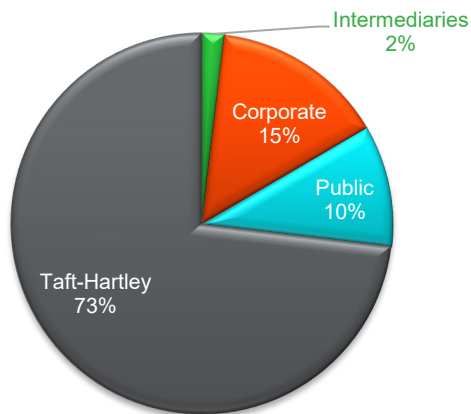
April 25, 2022 / Francois Otieno, Director of Fixed Income

About Segal Marco Advisors

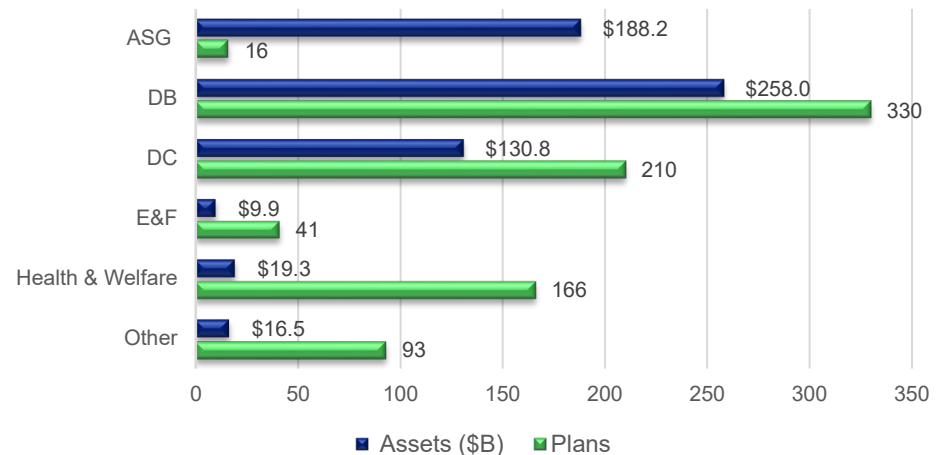
- Wholly-owned subsidiary of Segal, established in 1969
- SEC registered Investment Adviser
- Primary line of business: Investment Consulting Services
- 113 employees located in 11 offices across North America and Europe
 - 31 consulting group
 - 37 research group
 - 45 client service group
- 856 plans (434 clients) with \$622.8 billion in assets



Percent of Number of Plans by Market



Client Base by Plan Type



Diversity, Equity, and Inclusion at Segal Marco

...to Segal Marco Advisors

Diversity involves creating a workplace comprised of unique individuals, where uniqueness is valued and differences are respected and utilized in a positive manner.

- Employee Development & Retention Programs
 - Training on Bias Awareness and Prevention of Discrimination
 - Mentorship Program, Talent Management and Succession Planning
- Recruitment
 - Internship Program (Heartland)
 - Targeted Campus Program
 - Business Plan Goal and Objectives
- Workplace 2023
 - Education and Awareness Community (Equity Matters @Segal)
 - Talent Pipeline
 - Opportunity Equity
 - Segal Services and Service Providers

...in the Framework of Investing

Diversity investment inclusion fosters multiple perspectives and promotes progress in a holistic manner, without judgement and adds value to portfolios' diversification discipline.

- Formerly established in 2018, our Diversity Investing Committee (DIC) is dedicated to research, advocacy, and incorporation of small, emerging and minority-owned firms in our client portfolios
- Diverse Asset Manager Initiative and Annual Outreach Event
- Proxy voting and corporate governance practice advocates for racial and gender diversity at publicly traded firms