

2023 IICF Insurance Industry Philanthropic Showcase



AIG



Amwins



Aon



AXA XL



Berkshire Hathaway
Specialty Insurance



Burns & Wilcox



CNA



CRC Group



Crum & Forster



EY



HUB International



Intact



Liberty Mutual



Markel



Marsh



Mayer Brown



Munich Re



NEIL



Swiss Re



The Hartford



Verisk



WTW



Zurich

Insurance Industry Charitable Foundation

The Insurance Industry Charitable Foundation (IICF) is a unique nonprofit that unites the collective strengths of the insurance industry to help communities and enrich lives through grants, volunteer service and leadership. Established in 1994, IICF is celebrating the thirtieth anniversary of serving as the philanthropic voice and foundation of the insurance industry throughout 2024, having contributed more than \$47 million in community grants along with over 337,000 volunteer hours by more than 125,000 industry professionals.

IICF reinvests locally where funds are raised for maximum community impact, and has served more than one thousand charities and nonprofit organizations across the US and UK.

This year, IICF will exceed \$50 million in community grants awarded and more than 3 million meals delivered to vulnerable children.

Please join us as we celebrate 30 years of impact and the industry's legacy of giving by continuing our fight against children hunger. Learn more and donate at www.IICF.org/30thcelebration

Visit www.iicf.org or follow us on social media at: LinkedIn and Instagram

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Bill Ross

IICF 2024 – Celebrating Thirty Years of Impact!

To our dedicated industry and community leaders and supporters:

As we reflect on the accomplishments and highlights of 2023 made possible through your generous support, we would like to recognize your leadership and ongoing commitment to the Insurance Industry Charitable Foundation (IICF) over the past years – and for the three decades since IICF's founding in 1994.

It is our privilege to serve as the independent, philanthropic voice of the insurance industry, an industry built upon the concept of being there when needs are greatest, and representing insurance professionals worldwide. We fulfill our mission of helping communities and enriching lives through your enduring support and dedication to IICF, with countless volunteer hours, generous sponsorship and fundraising support and your heartfelt involvement in communities throughout the US and UK.

We express our sincerest gratitude to all of you as we celebrate 30 years of industry giving and our work together. We continue to be inspired and motivated by the generosity and forward thinking of those leaders and supporters who came before us. Their vision laid the foundation for IICF's successes today and, of course, for tomorrow. I would like to personally recognize the founders of the Insurance Industry Charitable Foundation, Bruce Basso and Jim Woods, whose vision thirty years ago lives on and thrives today as a unique example of collective industry philanthropy – and one that will surpass \$50 million in community grants in 2024 during our 30th anniversary year.

We are particularly proud of what the industry, united through IICF, has accomplished, including:

- Assisting thousands of local community nonprofits through financial grants and volunteer service.
- Service of almost 800 insurance leaders in IICF Division, Chapter and Associate Boards and Committees.
- Leading conversations on critical industry topics designed to advance the future of inclusive work. By aligning industry themes with community benefits, we deliver unique platforms for learning and networking – while raising funds for those in need.
- Releasing the inaugural IICF Philanthropic Index, an independent report of industrywide contributions including more than \$1.1 Billion in charitable giving and 7.5 million volunteer hours served by a select group of insurance businesses in 2022.

Most importantly, working collaboratively through the IICF, our efforts provided crucial support in communities where our professionals live and work.

Finally, we are grateful to our IICF Key Partners you will read more about here, and their employees, who place their trust in our programs by providing a leadership level of strategic and financial support.

The year ahead holds tremendous promise. 2024 will be a year like no other as IICF celebrates thirty years of community impact! We hope you all will join us during IICF's 30th Anniversary as we celebrate the industry's legacy of giving and continue our fight against childhood hunger.

On behalf of all of us at the IICF, thank you for your continued support of our mission. Here's to resilient communities, strong families and a healthy environment for all.

Best Regards,

Bill Ross
CEO, Insurance Industry Charitable Foundation

AIG: Coming Together to Do What's Right for the Communities Where We Work and Live

At AIG, we recognize our influential role as a global corporate citizen and that, together, we can help create sustainable, equitable and impactful solutions to some of the world's greatest challenges. We design, manage and promote programs that empower our colleagues to leverage their expertise, time and generosity to impact our communities positively through volunteerism and giving. Often these programs involve collaboration with nonprofit and nongovernmental partners intentionally selected to serve those with the highest need and to promote equitable distribution of resources.

Uniting with Industry Peers

AIG colleagues often unite with fellow members of the insurance industry to serve as an ally to our communities together through volunteerism.

Members of AIG's US Environmental Liability Management team partnered with Chicago-area brokers to help support local foster children. Volunteers assembled kits for Foster Love, a nonprofit organization dedicated to improving the lives of children in foster care. The kits offered support resources and words of encouragement and promoted science, technology, engineering and mathematics (STEM) learning.

"It was an incredibly rewarding experience to give back to children in need," said Kerry Simon, EVP, Head of Environmental, Retail Casualty. "Coming together for a good cause alongside our distribution partners was an ideal opportunity to strengthen our business relationships while giving back to the local community."

AIG collaborates in its volunteer efforts with industry peers across different areas, including preparing and distributing meals for those facing hunger, improving ecological and community health through beach clean-ups, preparing back-to-school backpacks for students in need and making laundry and hygiene kits for individuals at a domestic and sexual violence shelter.



An AIG volunteer helps beautify Governor's Island.

Engaging Teams through Volunteerism

AIG teams leverage volunteerism as a tool for building a sense of connection amongst colleagues and their communities, especially during AIG Global Volunteer Month in April. AIG's Northeast Foreign Casualty team volunteered with The Friends of Governors Island to remove invasive species and create space for native plants to flourish under the growth of a developing urban forest. The Global Legal Compliance and Regulatory team volunteered with Habitat for Humanity to help build affordable homes for low-to-moderate income families. The Staff Counsel team, spread across multiple US cities, took coordinated action to volunteer at food pantries close to their homes.

"During AIG's Global Volunteer Month, AIG's Staff Counsel attorneys and support staff across the United States donated their time and energy to local food banks as part of a collective effort by our colleagues to give back," explains Julie Buechler, Managing Attorney. "Being able to come together near and far to contribute to a collective cause makes me so proud to be a part of this amazing team and organization!"

Honoring International Days of Significance

AIG colleagues honor important causes through volunteerism year-round. During Earth Month, colleagues in multiple countries recycled discarded soap and toiletries into hygiene care kits for the houseless with Clean the World. To mark World Humanitarian Day, AIG volunteers assembled personal-sized solar lights and wrote messages of support to children living in energy poverty to help empower and encourage them to study after dusk and improve their education outcomes. During #GivingTuesday, AIG colleagues and their families contributed 500 hours in volunteerism and acts of kindness and donated in support of over 60 charities.

Kate Gill, Global Head of Learning and Development, who participated in the World Humanitarian Day event with members of her local team, said, "It's always amazing to come together as a company and to connect for good." ●



AIG volunteers with Aon at Ronald McDonald House in Chicago.



Assembling solar lights in honor of World Humanitarian Day 2023.



AIG colleagues helped build affordable housing with Habitat for Humanity Newark.



Colleagues build skateboards for foster youth during AIG's Global Volunteer Month.

Amwins: Charity Spotlight – Pipeline Project & Community Matters

In 2012, leadership from Amwins drove the founding of Community Matters, an organization that harnesses the collective philanthropic muscle of insurance and risk management professionals in the Charlotte area. Community Matters brings together insurance industry professionals to make a meaningful difference for selected nonprofits and charities in our community – **choosing one cause at a time** for which to donate time and raise funds.

In November of 2023, the organization celebrated a milestone of \$2,000,000 given back to the Charlotte metro since Community Matters' inception.

After discussion and listening sessions with community leaders throughout Charlotte, Community Matters this year made a long-term commitment to focus efforts on upward mobility for the area's youth. The organization's Pipeline Project will help young people in the Charlotte metro have better opportunities to achieve college and career readiness.

As its charity partner for Phase I of the project, Community Matters will support the Renaissance West

Community Initiative, a purpose-built community serving the needs of families in West Charlotte, an area with a high concentration of citizens living in conditions of poverty and housing insecurity. The Renaissance West Community Initiative's mission is focused on affordable housing, health and wellness, education and opportunity for the underserved community. One area Community Matters' assistance will address is education – helping to extend opportunities to high school age youth, taking the mission beyond the pre-K-8th grade served by the lone school located within Renaissance West.

Localized Philanthropic Philosophy

Our firm's commitment to community service and philanthropy is collectively branded under the umbrella of **Amwins' Summer of Service**. Many of our service projects take place in the summer months, however, our offices and team members throughout the country embrace a continuous spirit of giving that is not confined to one season or firmwide initiative. This is due to the belief that our teams know best how to identify needs in the places they live.



Amwins team members attending the 2023 Inside P&C Honors.



The first graduating class of the Amwins Women's Leadership Program, which launched in November 2021.

This year, our team members have made a difference volunteering with hundreds of community partners. In various locations across the United States, we contributed thousands of hours and raised tens of thousands of dollars and/or in-kind donations to help where our people felt the support was needed most.

In the United Kingdom, the Amwins Global Risk team has participated in a myriad of charitable giving this year, including volunteering at several organizations as part of the annual Summer of Service program, Macmillan Coffee Morning and the Insurance Industry Charitable Foundation's (IICF) Kids Out Christmas Giving Campaign. The Cheltenham office has raised over £3,000 for the Pied Piper Appeal and recently announced a partnership with the Matthew Wilson Multiple Myeloma Fund.

As of the end of October 2023, Amwins team members have collectively participated in volunteerism approaching 2,000 hours of time dedicated to various organizations. Additionally, we're proud to have matched more than \$25,000 in donations year-to-date through **Amwins Gives**, our matching gifts program.

Contributing to Diversity & Inclusion – Within our Firm and Throughout the Industry

Through our Diversity and Inclusion Council, we've developed and implemented a range of educational resources and activities intended to celebrate and encourage Diversity & Inclusion. Most recently, our Black History Month Trivia initiative engaged team members throughout Amwins and made the shortlist for a Diversity & Inclusion Award at the 2023 Inside P&C Honors. Amongst other related accomplishments



Our Diversity Partners



is the recent graduation of the first class of leaders from our Women's Leadership Program.

As a supporter of the IICF IDEA Council and a signer of the CEO Act!on Pledge for Diversity & Inclusion, it is important to us that we continue to place emphasis on Diversity & Inclusion within our Firm. We actively support industry efforts by contributing time and financial support

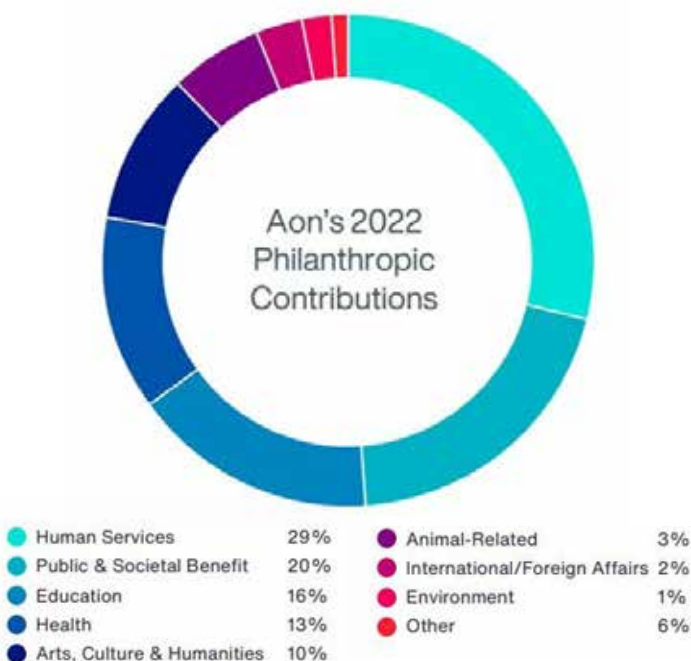
to organizations such as APIW, LINK, NAAIA and more.

Support for Gamma Iota Sigma and numerous other development programs is ongoing, with many Amwins leaders serving as mentors, speaking at conferences, contributing content in industry publications and engaging with individuals who will guide the future of our industry. ●

Aon: Committed to Making a Positive Impact

Aon is committed to making a positive impact in the communities where we live and work around the world. We believe in the power of volunteerism and philanthropic investment to make our regions stronger, more prosperous and better connected.

Our charitable work is driven by our firmwide strategy and our colleagues' local connections and commitment to amplifying our impact. In 2022, our charitable contributions totaled more than \$12M across the following categories:



This year, we deepened our global commitment to the environment – helping our partners to mobilize quickly in the event of disasters – and continued to forge new pathways into our firm and sector for non-traditional talent.

Global Impact – Highlight from Aon Australia

In Australia, 105 colleagues, friends and family members participated in the annual City2Surf race in Sydney. Team Aon raised **\$37,758** for Black Dog Institute (BDI), an Aon Charitable Foundation partner since 2016, that focuses on the prevention, identification and treatment of mental illnesses for all Australians. Funds raised will go towards important research and initiatives like [Black Dog Aboriginal and Torres Strait Islander Lived Experience Centre workshops](#).



Australia colleagues at Bondi Beach volunteering and participating in the City2Surf race. From left to right is Marise Maechler, Andrew Howlett, Bill Hooper, Chloe Scott and Eima Alkheder in the front.

Helping Our Communities Recover from Disaster with the Red Cross

Large scale disasters are striking more frequently around the globe and with greater intensity. That's one reason why we are so proud of our ongoing partnership with the Red Cross. As a member of the Annual Disaster Giving Program, or ADGP – Aon contributes \$500k annually to help ensure responders can be on the scene of a disaster at a moment's notice to provide shelter, food, emotional support and other assistance to people in need. This investment is split to support domestic and international preparedness and response efforts. Aon's giving to the Red Cross totals more than \$7.1 million since 2010.

Aon markets around the world also support local Red Cross and Red Crescent affiliates by hosting on-site blood drives, assembling hygiene kits for disaster victims, sponsoring Red Cross fundraising events and hosting preparedness training events.



Colleagues cleaning up the Chattahoochee River in Georgia.

Environmental, Social and Governance (ESG) / Aon Delivers Environmental Support

Community Grants

In 2023, Aon was proud to introduce “community grants,” a pilot program designed to support the environmental causes our colleagues care about. The Aon Foundation ran a selection process and ultimately funded \$50,000 of grants across 10 projects. Each community grant supported a nonprofit organization and a service day for colleagues. Our people pulled trash from rivers, hosted park cleanups, hiked local mountain ranges for trail maintenance days and even helped endangered turtles on their migratory path to the ocean.

Rebuilding Ecosystems Together in Spain

To rebuild ecosystems damaged by a 2017 fire, the Aon España (Spain) Foundation, a nonprofit body formed by a group of colleagues, has collaborated with the reforestation organization Bosquia to plant trees in Candamo, a municipality in Northern Spain. Volunteers from Aon worked alongside local young people with developmental disabilities to create an Aon España Foundation ForestOpens in a new tab of 500 native trees. This

engagement with our communities and the environment further demonstrates our commitment to sustainability, environmental stewardship and actions to achieve carbon neutrality.

Support Diverse Workforce Initiatives – U.S. Apprentice Program

Aon is proud that our ground-breaking U.S. apprentice program continues to improve and scale. We are equally proud that so many of our peer organizations have adopted similar pathways.

Our two-year program aims to eliminate barriers to diverse talent without a four-year college degree. We pay apprentices a full-time salary (plus benefits) and pay for their tuition, books and fees to a partner community college. During the program, our apprentices work with coaches and career navigators, who help them learn critical on-the-job skills and articulate their professional pathways. In 2023, we graduated our first national cohort of apprentices (and the largest!) from the program, most of whom were promoted out of the apprentice role and into the business role they have been apprenticing toward in our firm. We also welcomed more than 80 new apprentices, who will spend the next two years learning with us. ●



Aon's Apprentice Program Graduating Class of 2023.

AXA XL: Valuing Nature – Supporting Pollinators and Helping Biodiversity Thrive

The Importance of Pollinators and Why We Must Protect Them

Pollinators, such as bees and butterflies, are vital for countless fruits, vegetables and nuts. In fact, pollinators are responsible for one out of every three bites of food you eat!ⁱ Plus, it is not only food we need pollinators for. Half of the world's oils, fibers and raw materials rely on the important work of pollinators.ⁱⁱ

However, pollinator populations are under pressure. In recent years, there has been growing concern over both managed and wild pollinator population decline and growing health problems. The most significant cause of decline is thought to be land use change and loss of habitat.ⁱⁱⁱ Many areas that used to be dominated by diverse flowering plants have been altered or degraded. Invasive plants are increasingly displacing diverse native habitat. Diseases and parasites are causing health problems for pollinators. Furthermore, pesticide exposure is causing pollinator declines in some areas. Adding to all of this, climate change is exacerbating many of these threats and causing a host of problems for pollinators, including altering the time plants are in bloom, changing moisture and temperature levels that pollinators evolved with and causing extreme weather events that wipe out populations.^{iv}

If pollinator populations are not protected and supported, we risk food insecurity resulting in a negative impact on human health. A study^v from 2023 found a 3% to 5% loss in annual global production of fruit, vegetable and nut production, will lead to a reduction in the ability to enjoy healthy food options. It is estimated that this fall, the unavailability of healthy food may have led to over 420,000 people dying prematurely. This demonstrates the vital role pollinators play in not only our food supply, but also our health.

Our Backyard Biodiversity Program

AXA XL's sustainability strategy, [Roots of Resilience](#), has three pillars. One of these is "Valuing Nature," which shows that we're committed to protecting and restoring nature. From mangrove forests to the bees in our backyard, we are increasing biodiversity awareness and inspiring clients and colleagues to put nature at the heart of their plans. Here we shine a spotlight on our Program, "Backyard Biodiversity" which is focused on protecting pollinators.

Since the start of 2023, we have been working with [Pollinator Partnership](#), the largest nonprofit in the world focused exclusively on the promotion and protection of pollinators. Their mission is to promote the health of pollinators that are critical to food and ecosystems through conservation, education and research.



Photo provided by Pollinator Partnership for our Backyard Biodiversity program.

Our Progress So Far

Together with Pollinator Partnership, our work to-date has raised internal awareness amongst AXA XL colleagues and has begun to equip them to build in the protection of pollinators into their day-to-day lives.

"Green Up Your Life" Webinars to Raise Awareness: As part of NYC Climate Week, we hosted several internal webinars highlighting different programs ongoing at AXA XL. One of these webinars, called "Green Up Your Life," focused on Backyard Biodiversity. Pollinator Partnership joined us and provided a



The "Green up your life" webinar, showcasing the garden of one of our colleagues.



Two of the Backyard Biodiversity toolkit documents available to AXA XL colleagues.

fantastic overview of their work and the importance of pollinators. We also had colleagues from across AXA XL showcase their gardens and how they promote pollinators. It was very well received, with 1116 colleagues attending over the two calls, and we were delighted by the fantastic participation and webinar feedback.

Backyard Biodiversity Toolkits to Drive Action: With Pollinator Partnership, we have created a toolkit for all AXA XL colleagues that provides guidance and tips on how they can promote and protect pollinators in their day-to-day lives. This includes the following five parts:

- “Backyard Biodiversity” introductory video;
- “Meet the Pollinators Guide,” which covers pollination, pollinators and the challenges they face;
- “Growing Plants for Pollinators,” which covers how colleagues can grow native plants to support pollinators;
- “Guide to Bee Hotels,” which covers how colleagues can build a bee hotel and properly look after it all year round;
- “Identifying Pollinators Guide,” a bespoke guide produced for every location so colleagues can identify pollinators in their area.

Since the launch in June 2023, we have had over 400 colleagues engage with the toolkit. Furthermore, 70% of participating colleagues found the toolkit “very engaging.”

Looking forward, we aim to continue our Backyard Biodiversity program and amplify what we have achieved so far. Our global network of Green Committees will be supported by the Sustainability team to use their internal network to scale the awareness and engagement with the toolkit. By the end of 2023, we will also have a [Pollinator Stewardship Certification](#) available for AXA XL colleagues. This training is provided by Pollinator

Partnership and delivers more detail than the toolkit. For example, the training includes how to observe and monitor pollinator populations and the connections between indigenous communities and land stewardship. Certificated participants will be equipped with a science-based understanding of pollinator needs and an understanding of habitat creation.

Conclusion

So far, our Backyard Biodiversity program has been a success amongst colleagues. At AXA XL, we aim to harness the philanthropy we provide and utilize our global coverage of colleagues to drive change and have a positive impact. By providing toolkits, webinars and training, we are able to educate our colleagues on how they can value nature in their daily lives, local communities and bring further insights and learnings back to AXA XL’s Sustainability Strategy. ●

ⁱ Pollinator Partnership. (2023). About Pollinators. Retrieved from [About Pollinators | Pollinator.org](#) (6/11/2023)

ⁱⁱ Pollinator Partnership. (2023). About Pollinators. Retrieved from [About Pollinators | Pollinator.org](#) (6/11/2023)

ⁱⁱⁱ University of Cambridge (2023). Pollinators – The first global risk index for species declines and effects on humanity. [Pollinators: first global risk index for species declines and effects on humanity | cam.ac.uk](#) [29/11/2023]

^{iv} Endangered Species Coalition (2018). [How Climate Change has Affected Pollinators – Endangered Species Coalition. How Climate Change has Affected Pollinators – Endangered Species Coalition](#) [29/11/2023]

^v Smith, M. et al [2022] Pollinator Deficits, Food Consumption, and Consequences for Human Health: A Modeling Study. *Environmental Health Perspectives*, 130(12). Retrieved from [Pollinator Deficits, Food Consumption, and Consequences for Human Health: A Modeling Study | Environmental Health Perspectives | Vol. 130, No. 12 | nih.gov](#). [8/11/2023]

BHSI: Giving Back was Again a BHSI Hallmark in 2023

Once again in 2023, philanthropic and community engagement was a BHSI hallmark. A few highlights included ongoing activities with partners such as the Insurance Industry Charitable Foundation (IICF) and Braven, and the formation of new alliances to advance Diversity, Equity and Inclusion (DEI) in the insurance industry.

"BHSI seeks out people who have both excellent capabilities and strong character. That character is front and center when it comes to helping others and creating inclusive environments in our company and our industry," said Kim Briones, Chief Human Resource Officer at BHSI.

Insurance Industry Charitable Foundation (IICF)

The IICF's 2023 Week of Giving galvanized 148 BHSI teammates in seven US cities for over 400 hours of volunteerism. Numerous teammates participated in the UK as well. All found meaningful ways to give back, from preparing and packing meals for individuals with food insecurity, to restoring gravestones at a National Veterans cemetery, to supporting CV creation and donating interview attire to women in need. Nearly 200 BHSI teammates raised money for the Children's Relief Fund during the IICF's Step Up Challenge, a dozen US teammates took part in the IICF's Inclusion in Insurance Global Conference, and 279 coats were donated across five offices for the IICF Share the Warmth Coat Drive.

IICF's regional fundraising events rallied many teammates as well. There was Trivia for Charity in New York and Chicago, Casino Night and Corks for a Cause on the West Coast, Yacht Rock in Atlanta, a Cornhole Tournament in Boston and more. At year end, BHSI UK's Tree of Giving collected holiday gifts for children in need.

"IICF's fundraising and volunteer opportunities are so important to BHSI and to our industry. They bring us all together in meaningful and memorable ways – our customers enjoy the events as well," said Marcie Stephan, Senior Vice President at BHSI, who serves as Vice Chair on IICF's Midwest Board of Directors and is the point person on BHSI's IICF partnership.



IICF Week of Giving – NY team assembled and donated 200 Happy Hospital bags to "Friends of Karen."



BHSI Boston teammate volunteering at the Boys & Girls Club in Dorchester, MA.

Association Alliances

BHSI aligns with associations that match its values and goals to support recruiting and advancing diverse professionals in the insurance industry. This year it expanded its alliances to four more associations, including:

- LINK – The LGBTQ+ Insurance Network, whose mission is to make the insurance industry the employer of choice for the LGBTQ+ community.
- The Water Street Club, which focuses on making a positive impact in increasing diversity and inclusion at all levels of the insurance industry. BHSI was a proud sponsor of the association's Annual Insurance Industry Awards.
- DeGroote Women in Business, an organization devoted to engaging, motivating and empowering female business students by opening doors to business education and experience.
- The Canadian Association of Black Insurance Professionals, which advocates for representation, inclusion and advancement of Black professionals within the Canadian insurance industry.

"Our association alliances give teammates many ways to get involved in networking and working to create an insurance industry that reflects the diverse ideas, experiences and perspectives that make us all stronger," said Chief Human Resource Officer at BHSI Kim Briones.



Braven Summit – BHSI CEO Peter Eastwood with teammates Gloria Otakasongo, Kayla Nation, Kenya Ngote and Dennis Brown.



BHSI Chicago team volunteering at Breakthrough's Early literacy Program.

Braven

2023 marked BHSI's second year partnering with Braven, an organization which empowers promising underrepresented undergraduates on their paths to success. At the latest counts, 123 BHSI volunteers had tallied 1200 hours serving as leadership coaches, mentors and mock interviewers for students nationwide. "On just one recent Friday, our teammates conducted 48 mock interviews, preparing students to put their best foot forward," said Dennis Brown, Claims Manager at BHSI, who oversees the company's partnership and participation with Braven.

Another highlight was BHSI's Capstone Challenge, which challenged students nationwide to address a business question: How to make BHSI the company of choice for recent college graduates. Finalists impressed BHSI's Executive Committee with great ideas and presentations. The year closed out with BHSI CEO Peter Eastwood attending the Braven Summit to collaborate with Braven and other Braven partners on the organization's progress and vision for the future. ●

"BHSI's charitable activities and volunteerism are a true reflection of the passions and interests of our teammates. They bring their own personal commitments to make the mark they want to make," noted Kim Briones.



BHSI NY teammates volunteering at Lunch Box, in Monmouth County, NJ.



BHSI UK Team volunteering at The Conservation removing bracken and trimming scrub growth.



BHSI Atlanta team volunteering at Community Food Bank and Open Hand.



Burns & Wilcox: Championing Causes for Families in Need

Burns & Wilcox is dedicated to committing time and resources to organizations important to our associates.

Champions & Charities is our company's signature philanthropic initiative to give back to the communities where we live and work. In partnership with our parent company H.W. Kaufman Group, we provide associates throughout the U.S. and Canada paid volunteer time off to support nonprofit organizations close to their hearts.

This year the Burns & Wilcox Pittsburgh office was honored with the annual Champions & Charities Award. The office participated in a variety of community-based charitable efforts including rescuing and sorting hundreds of pounds of food, preparing and serving free hot meals to families in need, painting a new food donation storage facility, organizing a neighborhood clothing closet and donating items for and stuffing dozens of backpacks with school supplies.

Harvesting Hope Against Hunger

Harvesting Hope Against Hunger is an associate-driven initiative to support hunger relief charities.

In September 2023, associates throughout North America volunteered 1,000 hours to dozens of local food banks in areas where we conduct business.

Associates also hosted several food drives, collecting thousands of food items for those in need. Furthermore, Kaufman matched all associate donations dollar-for-dollar.



Indianapolis associates bagged 900 pounds of coconut at a local food bank.

Back-to-School Pack-a-Thons

Over the summer, we partnered with Variety – a charity that provides support to children who are sick, disadvantaged or living with a disability – to fill and donate more than 2,200 backpacks loaded with school supplies to local elementary students.



Kansas City associates stuffed dozens of backpacks full of school supplies.

Dress for Success

Associates from Burns & Wilcox offices throughout Florida organized clothing donation events to refill the closets at Dress for Success locations in Orlando, Tampa and South Florida. Associates collected and organized 5,000 pieces of professional attire.



Florida associates collected and sorted 5,000 pieces of professional clothing for Dress for Success.



Dallas/Fort Worth associates collected dozens of coats for the IICF Share the Warmth Coat Drive.

Coat Drives

Associates donated over 200 winter coats for the *Insurance Industry Charitable Foundation's Share the Warmth Coat Drive* benefiting One Warm Coat, a nonprofit that provides free coats to children and adults in need.

Employee Resource Groups

Kaufman allocated \$10,000 for each Employee Resource Group (ERG) to donate to an organization that is aligned with a cause important to its members.

- **APAC (Asian-Pacific) ERG:** Asian American Foundation, which serves the Asian American and Pacific Islander community in their pursuit of belonging and prosperity that is free from discrimination, slander and violence.
- **HOLA (Hispanic/Latino Organization for Leadership and Advancement) ERG:** Latinos for Education, a network of education leaders dedicated to elevating the voice, leadership and influence of the Latino community.
- **Umoja (Unity/ African American Association) ERG:** Betty Shabazz International Charter Schools, an African-centered network of schools whose mission is to provide academic and culturally relevant programs; and Eight Million Stories, a nonprofit dedicated to supporting at-risk youth through education, employment and personal development.
- **WINS (Women in Insurance) ERG:** Dress for Success, a global organization that empowers women to achieve economic independence by providing a network of support, professional attire and development tools.
- **Kaufman Pride & Allies ERG:** Trevor Project, the world's largest suicide prevention and crisis intervention organization for LGBTQ+ youth, public training and education in LGBTQ+ allyship and mental health support.
- **K-FAN (Kaufman Family Advocacy Network) ERG:** Realities for Children, which provides emergency and ongoing support for children who have been abused, neglected, abandoned or are at-risk.



HQ (metro Detroit) associates filled 500 snack packs with 3,500 nonperishable and easy-to-prepare food items for kids at risk of going hungry on the weekends.

Kaufman Relief Fund

The Kaufman Relief Fund helps associates in need when disaster strikes.

Since its creation in 2017, more than \$280,000 has been paid out to 60 associates. In 2023, associates raised more than \$40,000 to ensure the perpetuation of the fund and the care for colleagues when they need it most.

As helping others in times of need remains a core aspect of our business and the insurance industry overall, we will continue to champion causes that are meaningful to our associates. ●

CNA: Advancing Diversity, Equity & Inclusion with Employee Resource Groups

At CNA, diversity, equity and inclusion (DEI) is a journey that never ends. Our DEI framework consists of an ever-evolving strategy led by our DEI Council and heavily influenced by our eight Employee Resource Groups (ERGs). ERGs foster a sense of belonging for all employees by elevating employees' voices and championing DEI initiatives. In partnership with CNA's Corporate Social Responsibility team, ERGs connect their members with their communities – demonstrating allyship through volunteerism and giving. Collectively, CNA's eight ERGs supported nearly 80 nonprofits in 2023.

"It is important for our members to not only show-up in the workplace but also within our broader communities that reach globally. Specifically, our Women Impacting Leadership ERG promotes and partners with organizations that encourage the positive mentorship of our youth and growing professionals. Extending our positive message and providing our time and support outside of the office is essential to deliver meaning impact and opportunities to learn and connect with one another."



Emily Hanks,
Enterprise Risk Management
Consulting Director,
Philanthropic Chair for Women
Impacting Leadership

At CNA, we are proud of the work our ERGs do to empower the communities they represent. Each ERG has a unique mission and delivers a variety of networking and professional development, recruiting and volunteerism opportunities for employees across the enterprise.



AVID

Advocacy for Visible and Invisible Disabilities (AVID)

AVID advocates for employees with physical and/or mental health disabilities, and those who are caregivers, by creating awareness of the impact of disabilities on CNA employees, their families and the workplace. AVID members engage with and support Special Olympics International athletes on and off the field.



APEX

Asian Professionals for Excellence (APEX)

APEX builds a community that empowers Asian and Pacific Islander talent by providing opportunities and support for personal and professional development, knowledge sharing, networking and community service. APEX holds giving campaigns that utilize CNA's Matching Gifts program to support nonprofits like APIA Scholars.



EBP

Empowering Black Professionals (EBP)

EBP promotes awareness around African American and Black employee experiences, share professional insights, acquire information and provide leadership related to careers and the work environment within CNA. EBP members partner with Thurgood Marshall College Fund.



PRIDE

Pride

Pride empowers and strengthens members of the LGBTQ+ community through professional development, networking and community service opportunities; collaborates with the business on opportunities to drive business outcomes; and educates CNA employees on issues affecting the LGBTQ+ community. Pride members participate in Back 2 School America's annual LGBTQ backpacking event.



GP

Generational Perspectives (GP)

GP supports employees at all stages of their careers by offering professional and personal development opportunities that connect and celebrate the diversity of our workplace's several generations. GP utilizes their philanthropic budget to support nonprofits that provide work readiness programs.



VETERANS

Veterans

Veterans eases the burdens that active-duty military, veterans and their families face when transitioning in and out of the civilian workforce through networking, community service and comradery. Veterans participate in Chicago Veterans Ruck March every May, walking 17 miles in honor of Veterans lost to suicide each year. In honor of Veterans Day, they partner with Operation Gratitude to create more than 1,000 care packages for Veterans across the U.S.



iOHLA!

Organization of Hispanics and Latine Americanos (OHLA)

OHLA supports and develops Latine talent by promoting professional and personal growth through career development workshops, networking opportunities, recruitment, community outreach and volunteerism. OHLA members support local Latine communities by volunteering at food banks that provide much needed resources.



WIL

Women Impacting Leadership (WIL)

WIL inspires the women of CNA to realize their full potential through a community of support, service and learning. Annually, WIL hosts a giving campaign in February for Go Red For Women promoting heart health raising more than \$11,000.

CRC Group: Placing Others First by Giving Back

Our mission at CRC Group is Placing You First. The YOU in that mission can take on a variety of meanings. Many times, it means Placing Others First through volunteering and serving others. Our company's consistent involvement with Insurance Industry Charitable Foundation (IICF) boards, events and campaigns is a significant avenue for donations and volunteerism across the country. From participating in the IICF's annual Week of Giving to sponsorship of annual fundraising events or lending a hand at charitable events, Team CRC shows up time and again to assist nonprofit partners all across the country.

Supporting Stronger Communities through Local Action

Bowling for a Good Cause

In March, CRC teams joined with 40 other teams from insurance firms across the Charlotte region for the second Community Matters Bowling Tournament, an organization that has donated almost \$2 million over the past 10 years to local charities battling domestic abuse, homelessness, and alcohol and drug addiction.

Talmon Vice Memorial Clay Shoot

CRC Group's Houston, Texas team organized the Talmon Vice Memorial Clay Shoot to honor former broker, Talmon Vice, who passed away suddenly in September 2022. It was a huge success, with 75+ participants from all over coming together to shoot for a good cause, raising approximately \$36K to support Talmon's family.

Soaring Kidz Charity Tournament

Team CRC had a great time at the 2nd Annual Soaring Kidz Charity 3 on 3 Basketball Tournament! CRC Group was a proud sponsor of this event. Soaring Kidz is a registered 501(c)(3) nonprofit organization serving children and teens with varying abilities in the Houston area.

Food Pantry & Pregnancy Center Support

In the fall, the CRC Sumter Team gathered and donated 3 loads of non-perishable food items for the community pantry at Sumter United Ministries as well as a trunk full of diaper backpacks for the Sumter Pregnancy Center, stuffed full of lots of things new moms need!



Team CRC bowls for a good cause in Charlotte.



Team CRC came together to remember and honor, former colleague Talmon Vice.



CRC Boca Raton & CRC Sumter laced up their sneakers to raise awareness and funds for breast cancer research.



Stronger Together – Breast Cancer Awareness Events

Team CRC's Women's Network partnered with OBGYN, Dr. Julie Levitt, to host an interactive Zoom session focused on early detection to help raise awareness around breast cancer. Our Boca Raton, Florida and Sumter, South Carolina offices as well as others also hosted walks to raise awareness and funds for breast cancer research through the Susan G. Komen Foundation.

Annual Q4 Community Service Projects

Each year CRC teams all across the country collaborate with CRC Group's DE&I Community Outreach Committee to help facilitate a nationwide CRC Group community service initiative, focusing our efforts within our local communities. Examples of projects undertaken in 2023 include:

- **CRC San Francisco** volunteered at the SF Marin Food Bank to pack food boxes with canned goods and other non-perishable items to assist those facing food insecurity. The team unpacked 9 pallets of food weighing 1200+ lbs. that will feed 456 individuals.
- Throughout October **CRC Scarborough** participated in a food drive to support The Locker Project, a Maine nonprofit sharing more than 40,000 pounds of healthy food each month.



CRC Scarborough gives back by feeding others.

- In December **CRC Indy** volunteered with The Christmas Store, enabling family members who may not be able to shop at retail stores or online due to low income to provide gifts and needed items to their kids for Christmas. **CRC San Antonio** also wrapped presents in Santa's Workshop at Boysville.
- **CRC Scottsdale** volunteered with Treasures 4 Teachers to sort and organize donated supplies. Treasures 4 Teachers provides access to a wide selection of materials and resources to enhance the learning process within the classroom environment. They also provide free to low-cost tools and supplies to assist teachers with creating success for their students.

- **Team TAPCO** participated in a Feed the Hunger Pack-a-thon, packing more than 26,880 meals for those facing food insecurity.
- The **Tampa Bayport** office volunteered at Metropolitan Ministries to prepare meals, sort donations and assist with the metro market pantry.
- Throughout Q4, our **Salt Lake City and Denver** offices gathered non-perishable food items for donation to the Parker Task Force Food Bank.
- The **Highpoint Team** provided welcome baskets to families receiving Habitat for Humanity homes. The baskets included basic needed items such as sheets, trash bags, cleaning supplies, shower curtains, etc.
- **CRC Shrewsbury** teammates from both the Shrewsbury and the former Parsippany/Roseland offices joined forces to support the Marine Corps. Toys for Tots program by collecting donations of new toys and books.
- **CRC Chicago** volunteered at the Greater Chicago Food Depository, re-packaging 5,880 pounds of pasta to create meals for families facing food insecurity.
- **CRC Shreveport** helped Common Ground Community set up their Christmas Market to support children's programs, hosting community meals and providing food and clothing.
- **CRC Irvine** worked with Families Forward to pack 200+ grocery bags with Thanksgiving meal food items for local families, sorted several large bins of non-perishable food items in preparation for filling Thanksgiving bags, and packed bags of regular food items for meals other than Thanksgiving. ●



CRC Irvine ensures others in their community can enjoy a Thanksgiving meal.

Crum & Forster: An Inclusive Approach to Giving

Crum & Forster believes that being a good corporate citizen is at the heart of doing good business. In fact, we believe in “doing good by doing well,” a philosophy rooted in our parent company, Fairfax. Our commitment to supporting the communities where our employees live and work runs deep and has been a distinctive feature of our culture dating back to 1822. Our inclusive approach to social impact is evident through our Employee Directed Programs and enthusiastic spirit of volunteerism.

Corporate Giving

Donating more than \$2 million annually, we intentionally focus on smaller organizations making significant impact to their local communities and where our employees can be personally engaged as volunteers. We also seek to fund larger projects that have the potential for strong community impact, such as a multi-year financial commitment to support development of the new outpatient Behavioral Assessment Center at Morristown Medical Center in New Jersey – where many of our employees live and work.

Employee Giving

We believe that a culture of strong social responsibility should represent the diverse voices of all of our co-workers. In this spirit, we encourage our employees to help us direct additional giving through our Charitable Impact Committee (CIC) and our C&F Cares Program.

The CIC is an elected committee comprised of employees from diverse locations and levels within the organization. The group focuses on directing additional company donations to local charities and organizations. In 2023, we donated \$1.1M to 115 organizations.



C&F employees, and IICF Northeast Board Members, volunteering at NY Common Pantry during IICF's Week of Giving in New York.

The C&F Cares Program amplifies our employees' desire to support charitable organizations that are meaningful to them. We support their generosity by providing a 100% company match to both employee giving and charity hours, which has resulted in supporting 600 different nonprofit organizations.

Our employees embrace these opportunities. In October 2023, we participated in IICF's Week of Giving and employees in our N.J. offices of Morristown, Jersey City and Eatontown actually transformed this week into an entire month! We held multiple volunteer events across the tristate area, including participation in the IICF “Share the Warmth” coat drive.



C&F employees volunteering with Clean Ocean Action during IICF's Week of Giving in Central New Jersey.



It is difficult to find a C&F employee event that does not have a charitable component or one without a member of our senior leadership team. C&F's CHRO, Barb Katz, and CFO, Arleen Paladino, volunteered during IICF's Week of Giving in New Jersey.



Attendees at our in-person New Hire Onboarding Events participate in a charitable activity. In 2023, more than 150 employees each created a message of hope, which was donated to local charitable partners. We believe that “doing good by doing well” starts on Day One at C&F.

Belonging@C&F

At C&F, we pride ourselves on supporting our communities but also on empowering our workforce to reach their full potential. We do this through our leadership Inclusivity Council and our seven active Employee Resource Groups.



Each year, our Advocates for Black Equity (ABES) Employee Resource Group holds a Juneteenth celebration complete with entertainment, education and community engagement.

Our Inclusivity Council along with our Employee Resource Groups (ERGs) – Advocates for Black Equity, Diverse Abilities, Global Asian Pacific Islander, Pride, Somos, VALOR and Women Amplifying Value & Equity – are company-sponsored, inclusive spaces, led by our employees who share common backgrounds or life experiences. They provide members and allies a forum to learn, connect, advocate and support one another while helping to foster innovation, drive growth and demonstrate our “great place to work” culture.

The ERGs partner to create awareness and understanding. For example, C&F’s Multicultural Art Gallery in our Morristown, N.J. headquarters, carefully curated in collaboration with our ERGs, showcases artists from underrepresented communities and creates another space to inspire conversation and cultural understanding.



Members of C&F’s seven Employee Resource Groups came to celebrate the unveiling of the Multicultural Art Gallery.

C&F is also committed to providing networking and connection opportunities that foster growth. More than 40% of the mentees within our first Mentoring Program were people of color and we proudly joined in the first IICF IDEA Council cross-company Mentoring Alliance. In addition, a number of C&F employees completed the Korn Ferry Foundation’s Leadership U for Humanity through our partnership with the National African American Insurance Association.

To support our belief in diverse giving, we provide each of our ERGs with a charitable giving budget. ERG members choose organizations to support and direct their giving budget. All ERG support resulted in numerous opportunities for our employees to engage with local and national nonprofits including educational seminars, in-person and virtual volunteer events.

Outside of our internal awareness, education and development efforts, C&F is proud to extend both financial support and dedicated time to organizations such as the American Property & Casualty Insurance Association, IICF, the National African American Insurance Association and the Association of Professional Insurance Women, to name a few.

Collectively in the year 2023, C&F gave more than \$2 million dollars and our employees gave thousands of hours across the United States. We are proud to make such a positive difference in our communities. ●



Members of C&F’s Global Asian Pacific Islander (GAPI) Employee Resource Group volunteered at Heart of Dinner in New York City.

EY: Working with Impact Entrepreneurs

Launched in 2018 with the ambition to positively impact one billion lives by 2030, the **EY Ripples** program embodies our quest to lead EY people and networks in accelerating progress toward the UN Sustainable Development Goals (SDGs).

Together with our professional services clients and other like-minded organizations, EY people use their skills, knowledge and experience to bring positive change across specific areas of focus. We believe our combined capabilities can make the biggest impact — where each ripple we start has the potential to join with others and create waves of change. Three focus areas within EY Ripples are:

- 1. Supporting the next generation.** The world needs critical thinkers and creative problem solvers, ready to collaborate on solving society's toughest challenges. As a world-renowned developer of talent, the EY organization extends its knowledge to help young people and underserved groups build the mindsets and skills needed to succeed in an era of unprecedented change.
- 2. Working with impact entrepreneurs.** The world needs business model innovation that prioritizes social justice, economic inclusion and environmental regeneration. This is where impact enterprises already live. EY people extend their professional services skills and experience to help these enterprises achieve true scale and significance.
- 3. Accelerating environmental sustainability.** The world needs urgent action to address the climate emergency. As a leading provider of climate change and sustainability services, the EY organization extends the value of its knowledge and experience to help accelerate adoption of new models, technologies and behaviors that protect and regenerate the environment.

With billions of people still excluded from access to decent work, opportunities and goods and services, a special breed of innovators we call “impact entrepreneurs” are coming up with better answers to global problems and driving progress toward the SDGs. We extend the value of EY knowledge to provide a range of services to help impact enterprises scale and bolster their success.

EY professionals work with impact entrepreneurs in-person or virtually, offering support to help improve their businesses' resilience, productivity and capacity to scale sustainably. More than 500 projects with impact enterprises have been completed in more than 60 countries, focused on scaling and promoting off-grid renewable energy, clean water and sanitation, sustainable products, gender equality and other SDG-aligned missions.

The EY organization collaborates with leading impact investors and entrepreneurship networks to provide a variety of skills development and coaching programs for impact entrepreneurs. These typically feature a combination of practical training, peer discussion, and individual or group coaching. Designed with the busy entrepreneur in mind, coaching programs focus on common barriers to growth and range from half-day workshops to recurring monthly sessions.

Some of these digital tools and resources are:

EY Finance Navigator. Our online financial modeling software is specifically designed for startups; impact startups qualify for a 75% discount.

Co-developed with global social impact investor, Acumen, the **inclusive business playbook** provides a practical framework and inspirational case studies to guide businesses in adopting a more systemic approach to the inclusion of low-income and marginalized communities.

EY Velocity. This is a free digital platform that enables ambitious entrepreneurs to understand the drivers of growth for their businesses.

Business Clinics. Our Business Clinics are dynamic workshops that unite impact entrepreneurs who share common interests and growth barriers. We foster collaboration and community through a mix of practical training, peer discussion and personalized coaching.

Impact Hives. Impact Hives are targeted, high-impact innovation events where entrepreneurs meet with select groups of senior leaders to brainstorm ways to solve common challenges.



We believe that SDG No. 17, “Partnerships for the Goals,” is the key to unlocking all the sustainable development goals. EY collaborates with leading organizations to help impact enterprises scale. By embedding an impact focus within EY programs and creating a global mentoring community of alumni, EY teams extend the value of our EY Entrepreneur Of The Year™ and EY Entrepreneurial Winning Women™ programs to impact entrepreneurs as well.

Impact entrepreneurs are already changing millions of lives by making it their business to tackle social and environmental challenges. By working with them and collaborating with others, EY professionals are helping them to impact millions more. ●

Resources

[Corporate responsibility – Our latest thinking | EY - US](#)

[Impact entrepreneurship | EY - US](#)

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HUB International: Volunteering in Greater Dallas and Beyond

At HUB International, we are committed to supporting many philanthropic causes and participate in various charitable initiatives as an organization annually. Employees are able to facilitate creativity, passion and connection with their communities through HUB GIVES, a companywide charitable and community-giving program that enables HUB employees to donate their time and service to community projects. HUB organizes various programs both corporately and regionally to support a wide range of organizations throughout North America.

The HUB GIVES Program is Implemented in Each HUB Region, and Represents the Following Aspects:

Give: We give back to the communities where we live and do business.

Invest: We provide a foundation for future investment and ongoing participation.

Volunteer: We provide employees the opportunity to volunteer and work together, helping to build a sense of community pride within our organization.

Engage: We engage as many employees as possible in making a meaningful contribution.

Serve: We serve not only our clients but the community.

As longstanding partners with the Insurance Industry Charitable Foundation (IICF), and with several HUB executives serving on IICF's International and Division Boards, the company has participated in the annual IICF Week of Giving since 2010.

In addition, HUB International has participated in numerous volunteer activities throughout the years. This year we have volunteered with Vogel Alcove, Dallas Life, IICF's Dallas Fort Worth National Cemetery Clean Up project honoring veterans, and the Boys and Girls Club of Greater Dallas TOPPS and Santa Project.

HUB has been partnered up with [Vogel Alcove](#), a preschool serving children facing housing insecurity, since 2016. In 2016, we adopted a class of 2–3 year olds to become their Birthday Buddies. The Birthday Buddy program makes sure children celebrating birthdays have cupcakes, birthday decor and presents on their actual birthdays when possible. HUB, throughout the years, including this year, has not just served as a Birthday Buddy, but also contributed to school supplies, teacher supplies, clothes for new children in the class and holiday parties. We've done this for the Birthday Buddies class, as well as the neighboring class of 2–3 year olds.

This year in April HUB had the opportunity to serve lunch for [Dallas Life Homeless Recovery Center](#). Our team helped to clean up the kitchen as well. Volunteering here also helped some of the parents whose children attend Vogel Alcove, a full circle if you will, of support.

IICF's annual Dallas Fort Worth National Cemetery Clean Up honoring veterans, held each October during IICF Week of Giving, is a favorite among our employees. So many who volunteer at this project, which honors our US servicemen and servicewomen, have family members who are buried here or have served. This year, more than 300 insurance professionals joined together to clean 17,500 headstones. This volunteer opportunity brings joy to them and comfort knowing they are giving back to their loved ones.



Multiple companies participating in IICF's DFW National Cemetery Clean Up.



Dallas HUB International employees serving lunch at Dallas Life Homeless Recovery Center.

[Boys and Girls Club of Greater Dallas](#), is very special to HUB because we have been partnered with them for over 15 years. In the spring we help with their college sponsorship, TOPPS, by interviewing high school senior girls and boys from Greater Dallas for college sponsorship. This important event helps give those who may not otherwise have an opportunity to attend a college of their dreams achieve just that. HUB also is a Santa Project Sponsor for the Boys and Girls Club of Greater Dallas. We are paired up with children for the Christmas season and we donate toys and clothes on the children's wish lists. ●

"As HUB celebrates its 25th anniversary, we do so as we have always done, and that is with an eye to the community and how we can continue to be good corporate citizens and neighbors. This is part of our core values, it's who we are, and it is who we will continue to be."

– Kevin Bradley, HUB Vice President, Diversity, Equity, Inclusion, and Community



Dallas HUB International employees at the IICF DFW National Cemetery Clean Up.



Intact Insurance Specialty Solutions: Helping Others While Uplifting Economic Resiliency

At Intact, we exist to help people, businesses and society prosper in good times and be resilient in bad times. This purpose is embedded in our strategy and gives meaning to the work we do.

One of our core values is generosity, demonstrated by helping others and making our communities more resilient. Through our community-giving initiatives and community engagement program we empower our employees to live Our Values and make an impact.

Giving Back in the Communities Where We Live and Work.

The Intact Charitable Trust supports our employees' and producers' generosity including volunteer, leadership and philanthropic efforts. Through our community-giving program, individuals and teams from across the organization actively give back to the communities where they live and work.



In Plymouth, MN, employees drywalled a home for a local family with **Twin Cities Habitat for Humanity**.

We are always amazed and inspired by the range of charitable efforts supported by our employees and producer partners. Take a closer look at some of these community efforts throughout this year.

- In Plymouth, MN, employees drywalled a home for a local family with **Twin Cities Habitat for Humanity**. The positive effects of habitat ownership ripple to every area of a family's life and the impact extends for generations.
- Plymouth volunteers also spent an afternoon packing meals at **Feed My Starving Children (FMSC)** – a nonprofit organization dedicated to creating, hand-packing and delivering nutritious meals to malnourished children around the world. The team helped pack 100 boxes, consisting of 21,600 meals which provide 59 kids a daily meal for a whole year.
- In Chicago, Intact volunteers spent a day outdoors helping with habitat restoration at the **Blackwell Nursery** for the **Forest Preserve District of DuPage County**. These efforts included removing invasive plants, separating seeds and planting the area with native species to create healthy plant communities and ecosystems.
- An Intact team won this year's **Insurance Industry Charitable Foundation's Step Up Challenge**! As a winner of IICF's challenge, the team designated a grant to a nonprofit of their choice – **the Naperville Area Humane Society**.
- Every year, our Overland Park, KS office collects and donates supplies to local schools on both sides of the state line (Kansas & Missouri).



In Chicago, IL volunteers spent a day outdoors helping with habitat restoration at the **Blackwell Nursery** for the **Forest Preserve District of DuPage County**.



Morristown, NJ volunteers clean and beautify the grounds at Deirdre's House. This house serves as the only local site where a child victim can be interviewed by law enforcement, medically examined and treated by a pediatric abuse specialist, prepared for trial and clinically counseled under one roof. This allows them to be continually cared for in a space they know and feel safe.

Stronger Communities through Active Engagement

In 2021, Intact established a community engagement program, which now includes 11 U.S. offices across the country. Through the program, local teams can pursue hyperlocal opportunities and provide more significant charitable giving by establishing ongoing partnerships with local organizations and nonprofits advancing economic resiliency.

We are delighted to support the following amazing organizations:

- **Orangewood Foundation** – provides programs for foster youth to help them as they transition out of the foster care system. [\[Anaheim, CA\]](#)
- **United South End Settlements** – offers programs that support the whole family in achieving economic mobility. [\[Boston, MA\]](#)
- **School on Wheels of Massachusetts (SOWMA)** – dedicated to supporting the academic, social and emotional growth of students impacted by homelessness. [\[Canton, MA\]](#)
- **Neighborhood Boys & Girls Club** – dedicated to youth development, enhancing the well-being and developing the potential of its members, their families and the community. [\[Chicago, IL\]](#)
- **Special Olympics of Colorado** – provide year-round sports training and athletic competition in a variety of Olympic-type sports for children and adults with intellectual disabilities. [\[Denver, CO\]](#)
- **Chrysalis Center** – provide supportive services to assist people in need to transform their lives. [\[Farmington, CT\]](#)
- **Rutgers Center for Women in Business** – developing women leaders for tomorrow's evolving workforce and to achieve gender equity in business. [\[Hoboken, NJ\]](#)
- **Deirdre's House** – a center for child victims of abuse and/or neglect and for children that have witnessed violence. [\[Morristown, NJ\]](#)

- **UpTurnships** – builds strong bridges between gainful, growth-minded employers in the Twin Cities and dynamic, diverse local talent who are motivated, ambitious and ready to be part of a new, more inclusive Minnesota workforce. [\[Plymouth, MN\]](#)
- **Feeding Southwest Virginia** – nourish neighbors, engage community partners and develop solutions to address food insecurity. [\[Salem, VA\]](#)
- **White Pony Express** – helping eliminate hunger and poverty to those in need and bringing people living on the margins into the mainstream. [\[San Francisco, CA\]](#)

Being active in communities is a core part of our business. Intact employees are encouraged and enabled to give back to their local communities and support causes they care about.

We look forward to continuing to work closely with all the many worthy organizations our employees support, whether as individuals, teams or through our office community engagement programs. ●



Intact's San Francisco, CA community engagement team volunteering at the White Pony Express food reserve section ensuring food meets the organization's standards for packing and distribution.

Liberty Mutual: Torchbearers Program Empowers Employees to Give, Serve and Volunteer

As one of the largest global property and casualty insurers, our conviction is that insurance is a force for social good. We're there for people when they're experiencing crises and we are uniquely positioned to address environmental and social challenges for our employees, customers and communities.

Through our overarching employee community engagement program, Liberty Torchbearers, we use our financial strength and expertise to amplify employees' generosity and stand with them as they donate their time, resources and talents. The Torchbearers program empowers employees to support their communities and the causes they care about through three distinct programs: Give with Liberty, Volunteer with Liberty and Serve with Liberty. Whether employees are delivering meals, supporting disaster relief efforts or teaching children how to code, they are empowered to make a difference together.

Torchbearers meets employees where they are, no matter the season of their lives. If time is short, they can donate to a qualified nonprofit. If time is more abundant, they can volunteer outside of work and track the time, and if they want to connect with their colleagues while supporting the community, they can serve on company time during annual corporate service days and/or department activities.



Liberty Mutual leaders sorting clothes during the company's annual day of service, Serve with Liberty.

Give with Liberty

Give with Liberty is our charitable giving program that provides a 1-to-1 match on employee donations, with no upper limit. In 2023, Liberty Mutual employees gave to a variety of causes, including youth development programs, housing and shelter organizations, humanitarian efforts and many more.

Serve with Liberty

Serve with Liberty is our annual employee corporate service program. For three weeks in May, employees can sign up for a one-day service project in their local communities. Projects range from planting trees to serving meals to organizing donations and more. Serve with Liberty in 2023 encompassed:

- 16,510 employees
- 1,057 projects
- 867 nonprofits served through 48,512 hours of service across 20 countries

The total value of hours spent volunteering reached over \$1.5 million.



Liberty Mutual employee landscaping for a nonprofit partner during the company's annual day of service, Serve with Liberty.



Liberty Mutual employees stop for a quick photo while volunteering at Meals on Wheels of Tampa.

Volunteer with Liberty

Volunteer with Liberty allows employees to track their volunteer time outside of work. They are then entered into quarterly drawings where they can win a \$500 mini grant to direct towards a qualified charity of their choice. Each quarter, 550 employees earn this reward.

Employees who track one hundred or more hours of volunteer time per year are honored with membership in the Torchbearers 100 Club and can direct a larger grant from Liberty Mutual Foundation to the qualified nonprofit of their choice.

Through Volunteer with Liberty, employees come together and volunteer in a number of ways:

- **Skills-based volunteerism:** The breadth of knowledge and expertise across our company is vast and thousands of employees use their skills to do more for the communities around them. For example, our Corporate Strategy and Research group recently spent three months supporting Boston-based Commonwealth Kitchen to transform their business model and messaging strategy.



Liberty Mutual employees sorting books at More Than Words.

- **Employee resource groups (ERG) volunteer engagements:** Through ERGs, employees support their communities in a variety of ways. For example, our ERG for veterans placed wreaths on the graves of fallen soldiers; our ERG supporting women organized a walk to raise funds for breast cancer; and our ERG for LGBTQ+ employees supported Pride parades across the country.
- **Team-based volunteering:** Throughout 2023, teams across Liberty Mutual came together in a variety of ways to support their local communities, including managing food drives, building care packages for children in foster care and more. ●



Liberty Mutual employees in Indiana after volunteering at Reach for Youth.

Markel: Building on a Legacy of Philanthropy

Building on the Markel Style—the foundation of Markel’s people-driven culture—Markel’s community engagement mission statement affirms our commitment to strengthening the communities where we live and work. Markel is accordingly a proud partner and supporter of the Insurance Industry Charitable Foundation (IICF), including the IICF’s Week of Giving. In 2023, activities encompassed equitable food access, children’s health, family services and many more causes that our employees care about. Some highlights included:

- Joining forces with over 300 volunteers from across the industry to clean up the headstones of veterans at the Dallas-Fort Worth National Cemetery
- Prepping meals for families at the Ronald McDonald House Charities® of Richmond
- Battling inclement weather to sweep New Jersey beaches for the nonprofit Clean Ocean Action
- Collecting donations for the YWCA Richmond
- Volunteering at Goochland Cares, which provides basic human services and health care to members of the Goochland, Virginia community
- Supporting the IICF’s Share the Warmth Coat Drive in our Mid-South Region
- Helping “Fill the Truck for St. Philips” during its Richmond food pantry’s in-office food drive
- Supporting the IICF Cornhole Tournament, which raised over \$100,000 for local nonprofits in the Mid-South Region
- Working with the Liv Like a Unicorn foundation in New Jersey to donate and assemble Unicorn Boxes of comfort and care items for pediatric cancer patients
- Collecting school supplies for the Friends of Karen, which supports struggling families in the New York Tri-State area
- Raising funds for the Make-A-Wish foundation, which fulfills the wishes of children with a critical illness, in the Chicago and Rosemont, Illinois area



Employees from Markel’s Richmond, Va. office volunteered at Ronald McDonald House. They prepared meals for families who have a child in a local medical facility and must travel far from home for their child’s care.

Employee Charitable Giving

In the volunteer spirit of the IICF Week of Giving, Markel is committed to putting the power of philanthropy in the hands of our employees. We regularly survey our employees to learn what causes and organizations they support. To supplement employees’ charitable dollars, we also encourage employees to leverage the Markel Matching Gifts program, which adds a 3:1 company match to an employee’s donations to qualifying nonprofits.

Our Dollars for Doers program allows Markel employees to convert their volunteer hours into a cash matching gift. Every employee-submitted volunteer hour can be converted to a corporate donation. Another enhancement is Volunteer Time Off, where employees can take a company-paid personal day to support an eligible nonprofit of their choosing. Employees use their days to clean up local parks, volunteer at food banks or mentor others, among other activities. Many employees use Volunteer Time Off to support the IICF Week of Giving.



Employees from the Richmond, Va. office volunteered at GoochlandCares, an organization dedicated to providing basic human services and health care to neighbors in need.



Employees from Markel's Plano, Texas office and greater Mid-South region assembled 288 dry food bags, 180 frozen food bags and 24 boxes of produce for The Storehouse of Collin County.



Employees from Markel's Red Bank, N.J. office battled rain and wind to sweep beaches on the Jersey Shore with Clean Ocean Action, an organization dedicated to improving the quality of the marine waters off the New Jersey and New York coast.

Providing Equitable Access to Education

Markel has an extensive history of supporting education and ensuring that high-achieving students with limited means have a path to success. In recent years, we have improved equitable access to education by expanding our partnerships with higher education institutions through additional scholarship funding. For instance:

- The **Markel Specialty Scholarship** awards one-time tuition aid to a rising college senior from a group that is underrepresented within the insurance industry. Recipients must be enrolled in an undergraduate degree program with a concentration in risk management and insurance. Markel has made a long-term commitment to award the scholarship at six partner schools.
- The **VCU Markel Scholarship** provides financial support to six rising juniors in the business and engineering schools at Virginia Commonwealth University. These renewable scholarships allow recipients to focus on completing their degrees. All recipients are also invited to apply for our paid summer internships. The scholarship raises student awareness of Markel's career opportunities, reaffirming the unique talent relationship between Markel and VCU.

Improving equitable access to education extends beyond our support of these scholarships. Markel continues to fund various college endowments and advocate for students at all levels of learning. Recipients include workforce development, internship and skills-building programs for high school students, as well as other educational organizations.

Community Engagement at Markel

Markel's support for the IICF is aligned with our commitment to building a legacy of philanthropy. We support equitable food access, children and youth, education, mental health and housing and homelessness organizations across the globe, among other areas of giving. During the IICF Week of Giving and throughout the year, employees are empowered to get involved with causes that benefit their communities, increasing Markel's community engagement while creating a better world. ●



Employees from Markel's Red Bank, N.J. office sponsored the Liv Like A Unicorn foundation to support families dealing with pediatric brain and spinal cord tumors and to help fund research. The team assembled comfort boxes called "Unicorn Boxes," containing items such as art supplies, toys and games, for middle school children currently undergoing cancer treatment.

Marsh: Empowering Change, Transforming Lives

For 150 years, Marsh has been at the forefront of the insurance and risk industry, addressing the most pressing challenges of our time and making a meaningful difference in the lives of our clients, colleagues and communities.

Our priorities within our organization mirror our aspirations for society at large. We are resolute in our commitment to unlock people's full potential, promote inclusivity, nurture well-being and break new ground through innovative solutions and collaborations.

Empowering Tomorrow's Leaders: The RISE Fellowship Program

Developed in partnership with the National Black MBA Association (NBMBA) and Fisk University, RISE — which stands for racial inclusion and social equity — empowers emerging Black leaders with practical business knowledge and advocacy skills for social justice. These fellows are fully immersed in our business teams, gaining firsthand insights into clients and industries. They benefit from mentorship, coaching and leadership guidance from executives and senior leaders within our organization and the NBMBA.

This effort is clearly impactful. It gives high-level talent in business academia an opportunity not only to join Marsh in important roles, but to explore and spearhead the implementation of solutions to racial and social justice issues. This innovative program, now in its second year, has recruited another 52 talented fellows to participate in this immersive experience.

Catalyzing Change: Social Justice Double Match Program

The tragic events surrounding the death of George Floyd in 2020 were a catalyst for change across all of Marsh McLennan and led to the launch of the Leading the Change initiative that same year. This effort committed \$5 million over three years to support organizations advocating for greater equity for Black communities. As part of this initiative, Marsh McLennan introduced the Social Justice Double Match Program which matches colleague donations to advocacy groups. Marsh colleagues have actively contributed to this program.

To date, this program has contributed about \$2.3 million to more than 200 organizations, doubling the donations of approximately 1,600 Marsh McLennan colleagues. Our recipients include well-known organizations, like the NAACP's Legal Defense and Educational Fund, as well as lesser-known organizations like We the Protesters Inc. and Race Forward.

This year, the program was honored at Business Insurance's U.S. Insurance Awards as the Community Outreach Project of the Year.

"At Marsh, we empower colleagues to give back in ways that are meaningful to them. The Social Justice Double Match Program allows donations to be amplified, creating an even greater impact on nonprofits, particularly small organizations where our impact really makes a difference."

— Katy Rodriguez Botello,
Global Social Impact Leader, Marsh



Katy Rodriguez, Social Impact Leader, and Santonio Isom, Diversity and Inclusion Leader, receive the Community Outreach Project of the Year Award for the Social Justice Double Match Program.

Driving Impact: Focus on Education and Human Rights

Beyond our commitment, as evidenced through the Social Justice Double Match Program, we've identified key areas where we can create lasting impact: education, mentoring and criminal justice reform.

Marsh McLennan's unique partnerships with Gideon's Promise and A Better Chance empower us to make a real difference in these areas. Our support for Gideon's Promise funds the Public Interest Professionals Expanding Diversity (PIPED) program, whose mission is to strengthen the connection between the legal system and marginalized communities, offering scholarships to public defenders and forging essential relationships.

Simultaneously, our funding for A Better Chance directly benefits over 2,000 students a year, establishing vital career platforms and connecting them with employers dedicated to fostering diversity and equity within our communities.



Marsh McLennan President and CEO, John Doyle, and Marsh US President, Michelle Sartain, along with a group of colleagues, join forces with the American Red Cross during our Global Days of Service.

Global Days of Service: Strengthening Communities Together

Throughout September, our colleagues participated in our annual Global Days of Service, dedicated to giving back in honor of the 358 Marsh McLennan colleagues and friends we lost on September 11, 2001. This year, our efforts focused on building community resilience, supporting first responders and aiding those recovering from loss.

Over 1,300 colleagues volunteered more than 4,000 hours at 125 events, including 14 mapathons with our partner, Missing Maps, and a range of volunteer activities such as assisting elderly neighbors and cleaning up parks and beaches. In New York, Michelle Sartain, President of Marsh US, joined colleagues to assemble over 700 comfort kits for homeless veterans, reflecting our dedication to giving back to those in need.

"I'm deeply moved by the collective spirit and the meaningful impact of our Global Days of Service. It's a beautiful tribute to the memory of those we lost on September 11, 2001. In the face of adversity, we have shown that we can come together as a united force to bring about positive change."

— Michelle Sartain, Marsh US President

At Marsh, our legacy is not just about our past, but our relentless pursuit of a brighter future. Our commitment to making a difference, fostering inclusivity, and driving positive change remains unwavering. We look forward to another year of empowering change and transforming lives. ●



New York colleagues unite in a strong showing at the 9/11 Memorial & Museum 5k Run/Walk to pay tribute to those we lost.



The Marsh Private Equity and M&A (PEMA) team engage in a cleanup and gardening initiative to create a cleaner and safer environment for all.



Colleagues work alongside the Los Angeles Regional Food Bank to help combat hunger.

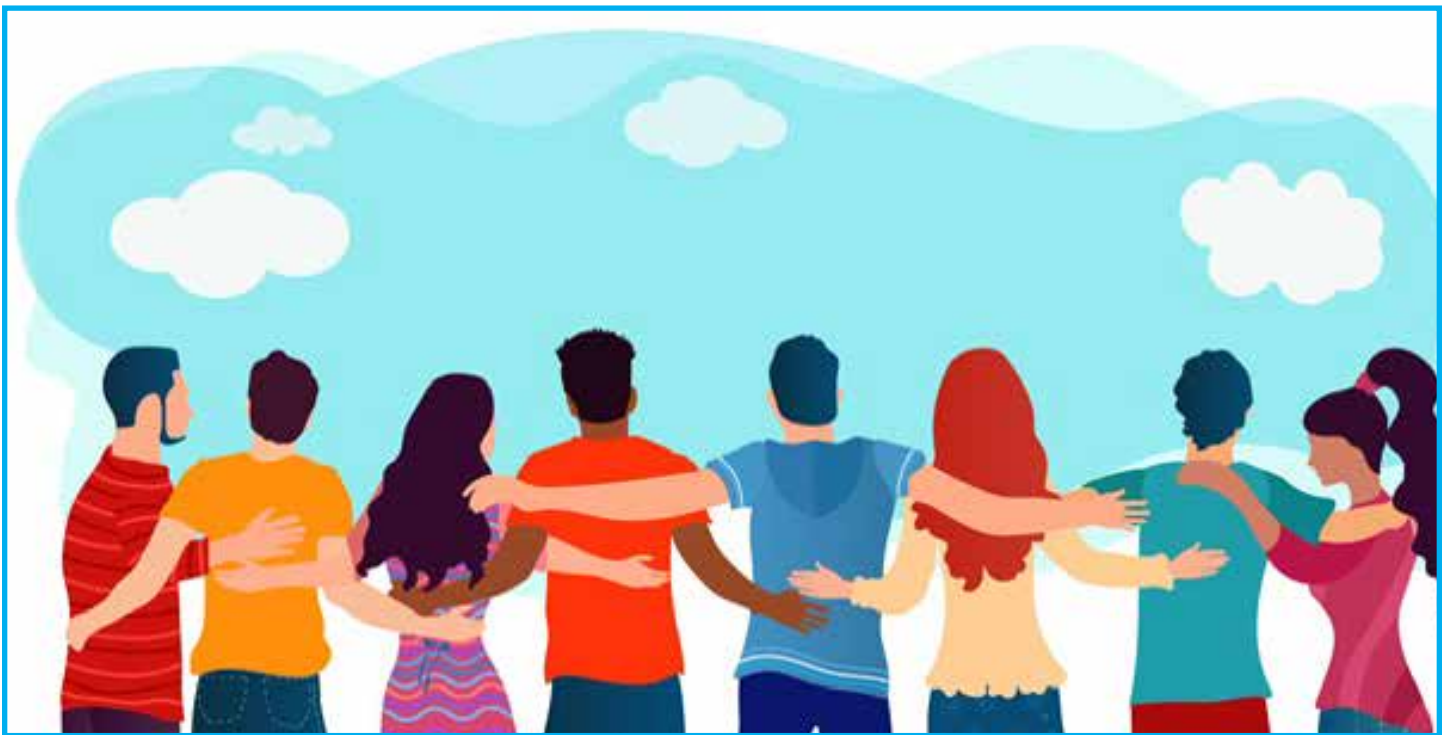
Mayer Brown: Partnering with IICF and Others on Important Philanthropic Endeavors

Mayer Brown is proud to partner with the IICF on philanthropic endeavors and to support the organization through participation on national and regional boards, sponsoring and hosting IICF events, and providing pro bono legal services.

Since beginning our work as outside counsel to the IICF in 2012, Mayer Brown has donated more than 1,500 hours of legal services to the IICF. This year we provided support by advising the organization on a number of matters, including advice related to intellectual property and internal governance. These hours are among the tens of thousands of pro bono hours that Mayer Brown donates each year to helping the those in need of pro bono legal assistance and the organizations that serve them. Mayer Brown has long deployed its resources to confront systemic problems around the world where it can have a major impact. In addition to supporting large-scale projects, the firm also encourages lawyers to pursue individual cases and issues

of importance to them. These cases can change people's lives and have a ripple effect that allows individuals, families and communities to thrive and succeed.

The firm continued this important work in 2023. A Mayer Brown pro bono team represented Ugandan visionary Emmanuel Trinity and his team in forming The New Africa Fund, which is committed to supporting civil society organizations and social enterprises in Africa, as a US tax-exempt non-profit organization. By obtaining tax-exempt status, donations to The New Africa are now tax deductible to US taxpayers, allowing The New Africa a more appealing fundraising opportunity in the US. The funds raised by The New Africa support the incredible efforts of Emmanuel and his team to provide sustainable solutions to youth unemployment in Africa by providing funds to various Uganda-based nongovernmental organizations, including era92 and 92hands.



Mayer Brown was proud to participate in IICF's Reading Partners Tutor for a Day in Brooklyn in October.



Mayer Brown participates in pro bono and community service efforts around the world, believing them to be a critical component of our profession and an important factor in establishing our true excellence as a law firm.

In addition, a Mayer Brown litigation team, in conjunction with co-counsel, secured a major pro bono victory for Arizona voters when the US District Court struck down numerous discriminatory, anti-voter provisions of two recently enacted Arizona laws, H.B. 2492 and H.B. 2243, that undermined Arizonans' freedom to vote and violated federal law. The decision prevents Arizona from rejecting voter registration forms submitted without documentary proof of citizenship, which discriminates against Latino citizens. The decision also invalidated the requirement that applicants provide documentary proof of their residence when registering to vote,

which was especially burdensome for Native voters who, due to disinvestment in Native communities, are more likely to lack the required documentation.

These are just a few examples of the pro bono and community outreach work that Mayer Brown is proud to undertake to provide a positive impact in the communities in which we live and work. We participate in pro bono and community service efforts around the world, believing them to be a critical component of our profession and an important factor in establishing our true excellence as a law firm. ●

Munich Re Property and Casualty Companies: Impacting our Employees and Communities through our Commitment to DEI and CSR

Munich Re continues to prioritize Diversity Equity and Inclusion (DEI) as a foundational part of our company culture. In 2023 we furthered our work regionally. We recognize that we are on a DEI and Corporate Social Responsibility (CSR) journey, and remain dedicated to building and maintaining partnerships that allow us to uplift, develop, and contribute to the communities where we live and work.

Deepening Relationships with Diverse Partners: Black Insurance Industry Collective (BIIC), National African American Insurance Association (NAAIA) and Prospanica.

This year we focused on internal development with our diverse partners in addition to building a more diverse pipeline.

Our DEI team participated in *BIIC's Building an Inclusive Leadership: Strategies for Increasing Representation* panel, in support of our recognition that inclusive leadership is vital, especially for black professionals. In addition, a member of our Diversity and Inclusion Advisory Network attended an intensive Leadership Development program.

Our DEI team along with ten colleagues attended NAAIA's annual conference, participating in various workshops, speaking on panels, and engaging with potential employees at the two-day Career Expo and Trade Show. This conference gave us time to network with other insurance professionals, strengthen our relationships with each other, and engage with students soon to enter the insurance industry.

Employees from HR and the business attended Prospanica's annual conference, which provided development and networking opportunities. We also ran a booth at Prospanica's career fair to further our goal of diversifying the insurance industry. Throughout the year, employees also took advantage of professional development opportunities through Prospanica programming.



DEI team and Munich Re colleagues at the NAAIA Annual Conference.



Munich Re colleagues at the NAAIA Career Fair and Trade Show.

In addition, we strengthened relationships with the Asian American Insurance Network, Insurance Supper Club for women in the industry, attended conferences to benefit our Veterans community and more!

Developing and Advancing the Youth of Tomorrow

Munich Re US P&C Companies is committed to the future of the insurance industry. Internally we've created an internship program [Dare 2 Dream] specifically for high school students who reside in communities often underrepresented. This internship focuses on developing students' critical thinking, presentation, networking and personal branding skills. We've also partnered with Junior Achievement, a nonprofit dedicated to inspiring and preparing young people for success.

Junior Achievement Career Fairs

Several employees spoke with middle and high school students about the insurance industry, education requirements, and gave students a peek into what our day to day looks like. Students walked away with an understanding of and greater interest in insurance, re-insurance and Munich Re.



Munich Re colleagues at the New York City Meal Packing event in remembrance of 9/11.



Sonja Mack, Mayor Armstead, and Ismail Adebayo at the Junior Achievement Career Fair.



Princeton DEI team and nonprofit organizations at Volunteer Fair.

US Regional Volunteer Event in Remembrance of 9/11

On Monday, September 11th, Munich Re participated as a Gold Sponsor of 9/11 Day, providing a regional volunteer opportunity for over 300 employees and their families across the US. We packed over 162,000 meals. The meals stayed in local communities and were donated to and distributed by Feeding America-affiliated food banks. Our goal was to commemorate the tragedy of the September 11, 2001 attacks by focusing on acts of service, unity and peace.

On-site Volunteer Fairs

Munich Re US P&C Companies held volunteer and community engagement fairs at two of our campuses. We brought in organizations that focus on food and home insecurity, advocacy for foster children, providing fresh produce to families and food banks and advancing our youth. Over 200 employees came in to visit tables and learn about the ways they can give back as individuals and teams.

Broadening Employee Benefits

This year our Regional Corporate Social Responsibility Committee introduced an assistance fund for employees. Our partnership with the Emergency Assistance Foundation allows us to provide financial support to employees experiencing disasters or personal hardship. This additional benefit provides our employees peace of mind and extra support during difficult times. In creating this fund we acknowledge it is just as important to assist our employees as it is the communities where they live and work.

Summary

We are passionate about continuing on our DEI and CSR journey, acknowledging there is always room to grow and learn. As we broaden our DEI and CSR commitment, we look forward to new ways Munich Re will make a positive impact and change in the communities where we live and work. ●

NEIL: Supporting Communities through DEI and Volunteering

NEIL continuously seeks to promote a culture of Diversity, Equity & Inclusion ("DEI") at the Company through the following key focus areas:

- Continue to promote a culture of inclusion
- Ensure a commitment to DEI in hiring and development
- Leverage support for NEIL's community involvement efforts
- Educate and inform employees on DEI

NEIL defines Diversity, Equity and Inclusion as follows:

Diversity – Our definition of Diversity encompasses the varying backgrounds, experiences, cultural norms, perceptions, values and beliefs that individuals can bring to an organization or workplace. These differences may come in many different forms, including but not limited to age, disability, ethnicity, gender, geographic location, political affiliation, military service, race, religion, sexual orientation, thinking styles, etc.

Equity – Our definition of Equity includes the fair treatment, access, opportunity, and advancement of all Employees, Members, and other business partners, while striving to remove obstacles preventing full participation.

Inclusion – Our definition of Inclusion is creating an environment that acknowledges and respects differences and allows everyone to feel comfortable and make their best contribution.

2023 DEI & Community Engagement Initiatives

This year, NEIL's DEI and Community Engagement Teams focused on many areas of Diversity, Equity and Inclusion at the Company implementing actions in support of the four key focus areas discussed above and in multiple activities that engaged with and gave back to the community.

In June, the DEI and Community Engagement Teams, in partnership with Soldiers' Angels, held a community outreach event at NEIL's Annual Meeting in Austin, TX. At this event, food and hygiene packages were assembled, which benefited both active military members and retired military members at veteran hospitals. With the participation of the Board of Directors, Members and NEIL Staff, we were able to meet our goal to assemble 200 packages donated to the center.



Soldiers' Angels event.



Holi Celebration

Holi has been celebrated in the Indian subcontinent for centuries, with poems documenting celebrations dating back to the 4th century CE. It marks the beginning of spring after a long winter, symbolic of the triumph of good over evil. Richly colored powders, each with their own significance, were thrown and smeared on participants to the musical soundtrack of the occasion. NEIL colleagues and family members gathered in celebration of the Holi holiday, as shown in the picture below.



NEIL celebrates Holi.

Ronald McDonald House of Delaware

Four of our team members had the privilege to provide and serve dinner to the families at the Ronald McDonald House of Delaware on behalf of NEIL.



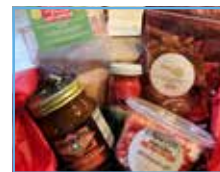
Serving at the Ronald McDonald House.

Juneteenth Virtual Tour

NEIL DEI participated in a Juneteenth virtual event, hosted by Unexpected Virtual Tours, to commemorate the history and meaning behind this important day.

Juneteenth marks the anniversary of the emancipation of enslaved African Americans in the United States. Onsite guides lead us through a virtual interactive and engaging one hour experience to explore the culture and significance of what is also known as Freedom Day.

As well as the virtual event, 10 participants received a treat box containing treats from 100% black-owned businesses, as shown below.



Juneteenth treat winner's treat box.

Over
225 hours
volunteered

Dollars
Donated:
\$ 175,098

of NEIL Employees
and Directors:
76 Employees, 13 Directors

Latinx Heritage Month Virtual Tour

NEIL DEI attended a second virtual event hosted by Unexpected Virtual Tours, this time to celebrate Hispanic/Latinx heritage month in September. This 60-minute virtual event took us through fascinating stories of Hispanic/Latinx history, musical influences that range from the introduction of the guitar to modern day pop icons and live-streamed visits to St. Augustine, Florida & Austin, Texas. Treat boxes were given out during this event, just as they were at the Juneteenth event.



Hispanic/Latinx Heritage Month winner's treat box.

Buddy Program

Monthly, NEIL highlights diverse cultural events and celebrations via a newsletter emailed to all staff. NEIL regularly updates its DEI page on its intranet, NEILnet, with not only these events, but also other relevant events, informational videos and educational opportunities for staff.

NEIL's Buddy Program that began in 2020, is still going strong with seven new members of NEIL being partnered with experienced employees to facilitate a smoother integration into NEIL's culture. These Buddies generally meet once a month, individually at first, and then later with other mentor/mentee pairs to continue their integration with other new employees.

Purposity

NEIL's partnership with Purposity, a company that supports nonprofits and educational facilities around the country to support their growing needs, continued in 2023. Our support continued with Brandywine School District, Ingleside Homes, Inc., Capital School District, and Orlando Day Nursery. NEIL employees met 120 needs totaling \$8,881, including employee-requested matching gifts.

Through NEIL's, and its CEO's, generosity to Purposity during the holidays, hundreds of individual needs were met in communities across the country. NEIL's funds had a particularly transformational impact on Capital School District in Dover, DE, where the district supports more than 400 students who experience homelessness each year by providing food, clothing, school supplies, medical referrals, housing assistance and other services.

NEIL's contributions fully stocked the clothing closet of the district's newly opened Capital Community Center! This is exciting!

"NEIL's generous contribution has allowed us to remove barriers for students and their families who are financially fragile. When we provide brand-new clothes, we give children a better opportunity to succeed academically, socially and emotionally."

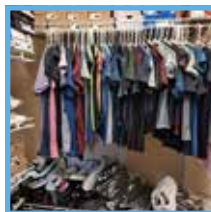
— Rod Fesel, McKenny Vento Liaison, Capital Schools

NEIL HOLIDAY IMPACT:

\$7,600 –
Dollars Given

45 – Employees
Participated

6 – School Districts
& NonProfits



Capital School District clothing closet.

American Cancer Society Relay for Life

Two of our employees headed up the Hope Floats team for the American Cancer Society's Relay for Life of Erie County, PA. Thanks to NEIL and its employees, \$14,921 was raised for this event.

NEIL also sponsored the event's Luminaria ceremony, when we celebrate those who have won their battle with cancer and honor those who are no longer with us.



American Cancer Society Relay for Life.

Other Initiatives

Multiple other local initiatives that NEIL supported in 2023 were mentoring at EastSide Charter School; the Mental Health Association NAMIWalk in May; the American Cancer Society Relay for Life Walk in June; United Way of Delaware Annual Pledge Campaign in October; the Toys for Tots 5k Walk/Run (raising \$14,000), the Ronald McDonald House Wine, Women & Shoes Fundraiser, and the Food Bank of Delaware's virtual food drive in November. NEIL also enjoys giving back to the community during the holidays. In the past, NEIL supported Adopt-A-Family, Wounded Warriors, and Toys for Tots, to name a few. In 2023, we will support Toys for Tots again, where employees donate toys at our Winter gathering in December. ●



25th Annual Toys for Tots Run/Walk check presentation.

Swiss Re: Building Bridges with Our Local Communities

The Swiss Re Foundation reflects the social and humanitarian values of Swiss Re, a leading wholesale provider of reinsurance, insurance and other insurance-based forms of risk transfer. To help build resilient societies, the Foundation offers its partners tailored grant financing, access to expertise, research and capacity building as well as collaborative networks, to create measurable, lasting impacts at scale.

In 2023, our primary objective was to boost volunteering efforts by our colleagues in our philanthropic initiatives. In the Americas, besides running our Charity of the Year (COTY) program, we have increased volunteering opportunities by supporting more charities with financial grants than ever before under our Community Day partner program.

All our COTY and Community Day partners are aligned with the Swiss Re Foundation's focus areas **Natural Hazard and Climate Risk Management** – and – **Access to Health**.

"Teaming up with colleagues in the same location to support a local nonprofit gives us a sense of purpose, satisfaction and actively contributes to our mission to make the world more resilient," says Cathy Desquesses, Group Chief HR Officer & Head of Corporate Services, Swiss Re, and Trustee, Swiss Re Foundation. "Building bridges with our local communities also strengthens our values, connections and enriches our working environment and employee experience."

In addition to volunteering with our charitable partners, Swiss Re employees organized and participated in fundraisers for their COTY's, the (Re)Insurance Sleep-Out benefiting Covenant House, and various emergency fundraisers in support of the ICRC, American Red Cross, Mexican Red Cross, Doctors without Borders, Gerando Falcões/Sao Paulo, besides others.



Swiss Re volunteers at The Sharing Shelf, which addresses clothing insecurity, in Port Chester, NY.



With the help of Swiss Re volunteers, the organization Por Un Hogar prepares lunch bags for families who are waiting for their relatives to be admitted to hospitals in Mexico City.



The Greater Boston Food Bank received volunteering support from our Boston office colleagues.



Kansas City team cooking for the residents at Ronald McDonald House of Kansas City, MO.



Swiss Reinsurance Head Canada & English Caribbean, Jolee Crosby (center) and her Toronto team serving Community Day with the food bank Second Harvest, their Charity of the Year.

This year, the Swiss Re Foundation and Swiss Re Sustainability teams have jointly designed the Dollars-4-NetZero program, replacing the former Dollars-4-Doers program. With the Dollars-4-NetZero program employees have the chance to win a CHF 10,000 grant for an impactful environmental project close to their heart!

Armonk based employee Kirsten Filosa successfully applied for the grant, benefiting the not-for-profit organization Riverkeeper, based in Ossining, NY.

The aim of the winning project is tackling carbon sequestration and the funds for the project will largely be spent for tree purchases and tree maintenance.

Swiss Re employees planted 68 native trees together with a scientist from Riverkeeper in the Westchester area of New York on September 28, 2023. At the same time, they received education on tree planting, climate change and how waterways are impacted.

Find out more about the Swiss Re Foundation and their local and global programs by visiting www.swissrefoundation.org. ●



Tree planting in collaboration with Riverkeeper at Saxon Woods Park in Westchester, NY.



Kids in Crisis, a shelter for children and teenagers, in Cos Cob, CT, received support from Swiss Re Armonk employees who prepared dinner in their kitchen. The kitchen was donated by Swiss Re Foundation a few years ago.



Kansas City team preparing quesadillas for the residents at Ronald McDonald House of Kansas City, MO.

The Hartford: Making Adaptive Sports More Accessible

In 2023, The Hartford expanded its partnership with Move United, the largest adaptive sports community program in the U.S., with a [\\$3.5 million commitment](#) aimed at increasing access to and participation in adaptive sports over the next three years.

Adaptive athletes pay approximately 15 times more for equipment than non-adaptive athletes and the company is working to help thousands of adults and youth with disabilities overcome this barrier to participation in sports. Over the past five years, The Hartford has donated more than 5,500 pieces of adaptive sports equipment in more than 50 communities across the country, positively impacting more than 45,000 people.

[In October](#), the company hosted a youth wheelchair basketball clinic and mega equipment donation with wheelchair basketball player Matt Scott. The Hartford, along with Scott, surprised youth athletes with 50 sports wheelchairs. Scott also competed in a free throw contest in which The Hartford contributed \$1,000 for every basket made for a total of \$50,000 to support Scott's Fly Without Limits organization.

The Hartford's partnership with Move United creates opportunities for thousands of adaptive athletes to participate in sports. Athlete experiences include The Hartford Adaptive Sports Competition Series, The Hartford Ski Spectacular, and events at local adaptive sports clubs across the country. At each of Move United's 20 annual events, The Hartford hosts a signature gifting experience to surprise individual athletes and local adaptive sports clubs with custom-fit adaptive equipment. ●

The following photos showcase the youth basketball clinic featuring world champion wheelchair basketball player Matt Scott and youth athletes that received custom-fit wheelchairs.





Verisk: Commitment to Community Resilience

Verisk is a leading strategic data analytics and technology partner to the global insurance industry. It empowers clients to strengthen operating efficiency, improve underwriting and claims outcomes, combat fraud and make informed decisions about global risks, including climate change, extreme events, political issues as well as opportunities including ESG and generative AI. Through advanced data analytics, software, scientific research and deep industry knowledge, Verisk helps build global resilience for individuals, communities and businesses.

Philanthropy is part of Verisk's commitment to social responsibility. Philanthropic support includes providing direct financial and in-kind support to advance important initiatives that complement our professional expertise and brand. The company also supports the communities where our offices are located and addresses challenges of interest to our employees.

Caring in Action

Caring is not just part of what we do, it's one of our core values and central to who we are. Verisk launched the #CaringInAction campaign to celebrate how its team members are making a positive impact on their communities, colleagues and clients. Throughout the month, teammates were encouraged to share stories of how they're volunteering or demonstrating caring. This initiative significantly resonated within our organization, as evidenced by an impressive 67.9% viewing the campaign-related posts, far surpassing our initial goal to engage a third of our team members. Every Caring in Action post served as an entry to win a donation in their name to the cause of their choice.



Verisk Volunteer Week – Newcastle, UK.

10th Annual Volunteer Week

Verisk team members from across the globe rolled up their sleeves and participated in various service opportunities and charitable initiatives as part of our 10th annual Volunteer Week. From preparing meals and collecting donations to planting trees and building community gardens, our team members put caring into action. We completed thousands of volunteer hours, which resulted in 40,000 meals packed for Risk Against Hunger, 506 trees planted, 275 meals served to less fortunate students, more than 50 charitable organizations supported and much more.

Employee Networks

Our employee networks play a vital role in helping to create an inclusive culture at Verisk. Verisk's employee networks host events and programs throughout the year with causes that make a positive impact on our communities. Through 2023, Verisk's eight employee networks, which are open to all and represent the Asian, Black, Latinx and LGBTQ+ communities, as well as parents, women, veterans and military service members, were very active. The networks raised funds for underprivileged groups, collected toys, clothes and school supplies and assembled care packages in support of communities across the globe.

Firefighters of Verisk

For many members of our Community Mitigation Services team, the work they do is personal.

Several of them serve as volunteer firefighters in their local communities – Verisk's Community Hazard Mitigation team has a combined 1,600 years of firefighting experience. Caring in Action recognized the dedication and passion of Verisk's teammates in the fire service. Having that wealth of firefighter experience on staff is extremely helpful in understanding the needs and concerns of fire departments and municipalities we serve through our Public Protection Classification (PPC) Service, which collects information on municipal fire protection efforts in more than 40,000 communities across the country.



Verisk Volunteer Week – Bradenton, Florida.

Exceptional Volunteers

Since 2018, the Verisk Exceptional Volunteers Award has recognized the outstanding service of our team members who give their expertise, effort and time to help numerous communities, causes and people. Our 2023 honorees include Verisk employees who:

- Assist healthcare professionals in providing free medical services to the homeless population of Krakow, Poland.
- Prepare home-cooked meals for various charities in the Birmingham, Alabama area and provide food to people who are experiencing homelessness and/or in poverty.
- Led family construction teams into Juarez, Mexico to help people living without running water in cinder block or pallet houses.
- Co-founded a nonprofit focused on violence prevention.
- And much more.

All our honorees exemplify Verisk's values of caring, learning and results, all of which reflect and drive our long-standing commitment to supporting organizations serving the communities where we live and work. Each received cash gifts of up to \$1,000 in their names to the organizations they serve.

Gratitude Week

Verisk colleagues were encouraged to celebrate a team member for living Verisk's value of caring and thank them for making a positive impact. Teammates expressed gratitude for their guidance, support, inspiration, understanding and positivity throughout their work together. Messages poured in to recognize contributions to teams who genuinely care about their clients and each other. ●



Verisk Volunteer Week – Hyderabad, India.

WTW: Serving The Communities

WTW (Willis Tower Watson) takes great pride in its commitment to serving and giving back to the communities in which it operates. Through a meaningful partnership with the Insurance Industry Charitable Foundation (IICF), WTW actively engages in various charitable projects, extending support in the form of financial support and volunteer work. This collaborative effort with the IICF is a testament to WTW's dedication to making a positive impact beyond its corporate endeavors.

In 2023, WTW colleagues participated in volunteer events and service projects, including the IICF Annual Galas, Rainbow Days and the Dallas Fort Worth National Cemetery headstone cleaning event. These initiatives reflect WTW's belief in the power of collective action and community engagement.

Colleagues from the Dallas office had the privilege of participating in the Dallas Fort Worth National Cemetery headstone cleaning event, a touching demonstration of respect and gratitude toward those who have served their country. This event not only serves as a tribute to veterans but also underscores WTW's dedication to honoring their sacrifices. The IICF Southeast Executive Board was also able to volunteer their time and efforts at Rainbow Days in Dallas as part of an outreach program, furthering their commitment to creating positive change at the local level and WTW's Los Angeles employees volunteered at Covenant House of Hollywood.

In addition to volunteer opportunities, WTW has made a substantial impact by awarding a remarkable \$6.5 million to local communities through its grants program, including an impressive award of \$515,000 from WTW's North Texas team to nonprofits championing important causes, including support for children at risk, education-related programs and veterans' causes. WTW believes in the

transformative power of community engagement and its dedication to making a positive impact in the lives of those in need and is grateful to partner with the IICF to support this work.

Diversity And Inclusion

We enjoy creating a welcoming workplace where employees bring their best selves to work, and inclusion and diversity are engrained throughout the atmosphere. Our inclusion networks are the backbone of how we connect and inspire colleagues in our workplaces and create an environment where diversity may flourish. Additionally, we have built inclusion networks worldwide for Gender Equity, LGBT+, Multicultural, Workability and Young Professionals, all of which are supported by a senior leader here at WTW. We are committed to fostering a diverse workplace where everyone is valued and heard. ●



IICF Southeast Gala 2023.



IICF Southeast region Dallas Fort Worth National Cemetery headstone cleaning event, October 11, 2023.



IICF Executive Board check presentation 2023. \$515,000 awarded to 26 non-profits partners championing children at risk, education and veteran causes in North Texas.



IICF Southeast Executive Board check presentation 2022. \$605,000 awarded to 25 non-profits championing children at risk, education, veterans and disaster relief causes in North Texas.



IICF Southeast Executive Board volunteering and outreach project at Rainbow Days in Dallas on September 6, 2023.



WTW Los Angeles employees volunteering at Covenant House of Hollywood, a grant recipient of IICF's.

Zurich North America: Commitment to the Communities We Serve is at the Heart of Zurich's Giving

In 2023, Zurich North America and its employees continued to work toward creating a brighter future together by investing their time volunteering within the communities where they live and work, contributing financially to causes they care about and supporting company efforts that align with their values. Zurich North America and the Z Zurich Foundation focused on supporting enhanced financial literacy, improving mental well-being in young people, strengthening climate resilience and helping address social inequities in vulnerable communities.

"I am incredibly impressed by the unwavering energy and dedication shown by our employees. Their commitment extends far beyond our business and customers, embracing the communities we serve," said Kristof Terryn, CEO, Zurich North America. "It is this extraordinary level of commitment that truly sets Zurich apart."

The Z Zurich Foundation is a charitable foundation and the primary means through which the Zurich Insurance Group, including Zurich North America, delivers on its global community investment strategy. While the Foundation provides funding, it also encourages employees to get involved at the local level to support the most vulnerable in our communities. By championing those who make a difference and together looking at the bigger picture, we have a better chance of addressing our society's most pressing issues.

Z Zurich Foundation and Zurich North America Team Up for Youth

The Z Zurich Foundation and Zurich North America collaborated with several organizations this year to support programs to benefit young people. Here are two:

- A three-year partnership with social change foundation Beyond Sport will support Head in the Game, an initiative which leverages sports to help improve mental well-being for 13- to 19-year-olds in the U.S.
- A four-year commitment to Junior Achievement USA (JA) will support a redesign of JA's kindergarten through 5th grade curriculum to incorporate a stronger focus on financial literacy as well as enhance digital elements to make the curriculum more accessible and reflective of the communities JA serves.

Recognizing Employee Contributions of Time and Treasure

In 2022, Zurich employees set—and surpassed—a collective goal to volunteer and log 30,000 hours, volunteering individually and as teams, in person and virtually, to support a wide range of causes, including offering their time and talents to organizations focused on natural disasters, food insecurity, student mentoring, home building, education, pro bono legal work, youth sports coaching, health-related causes, veterans services, child welfare and more. In addition to making an impact through volunteering, employees throughout the U.S. and Canada gave a total of \$1.87 million USD* in financial donations for the year through December 2, 2022, to benefit 1,265 charities.

"It is inspiring to see how our colleagues in North America continue to support their communities year after year, demonstrating that giving back is truly engrained in the culture at Zurich," said Andrea Davis, Regional Engagement Manager for the Z Zurich Foundation. "The Foundation is excited to support local initiatives, such as grants with JA and Beyond Sport, which are making a positive impact on young people while providing opportunities for Zurich employees to engage even more in their communities."



Zurich attorneys and legal staff volunteering at a criminal records relief clinic in collaboration with Legal Aid Chicago, one of two clinics hosted.



Zurich North America Volunteer and Community Hero Award Winner Nuala Gewargis



Zurich North America Volunteer and Community Hero Award Winner Eric Thomas

Community Heroes

The Zurich Community Hero Award recognizes colleagues across the globe who are bringing the values and behaviors of the Z Zurich Foundation (ZZF) to life in an extraordinary way. In honor of ZZF's 50th Anniversary, 50 outstanding employees were recognized worldwide this year, including two Zurich North America employees, who were each awarded the Z Zurich Foundation Community Hero Award for the outstanding impact each is making in their own community.

- **Nuala Gewargis**, Executive Assistant to the Head of Human Resources for Zurich North America, has volunteered for the Northwest Special Recreation Association (NWSRA) and Special Leisure Services Foundation (SLSF) for more than 15 years. She began by being part of the leadership team for an annual fun fair focused on making the event even more inclusive for children with different abilities. Most recently, she helped the organization secure a Zurich grant to fund the building of a sensory room designed to stimulate imagination and also to secure buses to transport children to the programs they attend. She cites her inspiration as a desire to inspire and empower those who face challenges and barriers in their daily lives by making them feel seen, heard and loved.
- Broker Relationship Leader **Eric Thomas** uses his skills internally and externally to support the LGBTQ+ Community. As a Co-Chair of PrideZ, an employee resource group committed to supporting the LGBTQ+ community within Zurich, Eric built awareness of diversity, inclusion, equity and belonging, as well as allyship of the LGBTQ+ community. He helped to formalize and increase PrideZ's engagement with the nonprofit organization, Youth Services, through supporting and planning volunteer opportunities. In 2022 alone, 22 Zurich employees volunteered more than 167 hours with this organization. He is also a 10-year volunteer with the AIDS Service Foundation of Greater Kansas City and supports causes including Big Brothers Big Sisters Kansas City and the Insurance Industry Charitable Foundation (IICF) where he serves on the board of the Heartland Chapter. He also helped found the Kansas City chapter of Stonewall Sports, a national LGBTQ+ nonprofit sports league. Eric believes there is no act too small to benefit our fellow human.

Whether it is by giving their time or treasure, the contributions made by employees are felt locally in the communities Zurich serves. ●

*Donations given in CAD were converted to USD and included in this figure.



Zurich North America employees surpassed a goal of completing 30,000 volunteer hours in 2022.

Registration is now open!



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IICF is celebrating thirty years of impact in 2024 – in our communities and in our industry – including \$50 million in community grants awarded to thousands of nonprofit partners throughout the US and UK. Join us as we celebrate the industry's legacy of giving by continuing our fight against childhood hunger.

Together, we have already provided more than 2.8 million meals to vulnerable children struggling with food insecurity through the IICF Children's Relief Fund. We aim to surpass 3 million meals delivered in our 30th anniversary year with the support of the insurance industry.

View our 30th Anniversary Celebration video here
to see the impact we've made over three decades of helping communities and enriching lives, together!

Learn more and join us at: IICF.org/30thcelebration



Insurance Industry Charitable Foundation 1994 • 2024

Insurance Industry Charitable Foundation

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