

A Commitment to Our

**People**

**Community**

**Environment**



CORPORATE SOCIAL  
RESPONSIBILITY 2019

# Corporate Social Responsibility

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Our commitment to our people has resulted in being recognized with workplace awards by various organizations and media publications throughout the U.S.

We pride ourselves on a being diverse organization that builds long-lasting relationships with and provides support for our communities, as well as national organizations.

## 2019 National Awards



## Workplace Awards 2014-2019



Please refer to page 7 for a complete listing of 2019 Workplace Awards.

# Our Company

## Culture

### Mission Statement

To provide exceptional advice and solutions that help our clients achieve their goals

### Vision Statement

To be recognized by our clients as the premier provider of accounting, insurance and other professional business services and by our team members as their employer of choice

### Core Values

We do the right thing.

Our people matter.

We are dedicated to the success of our clients.

We expect to win.

We are One CBIZ.

### Service Promise

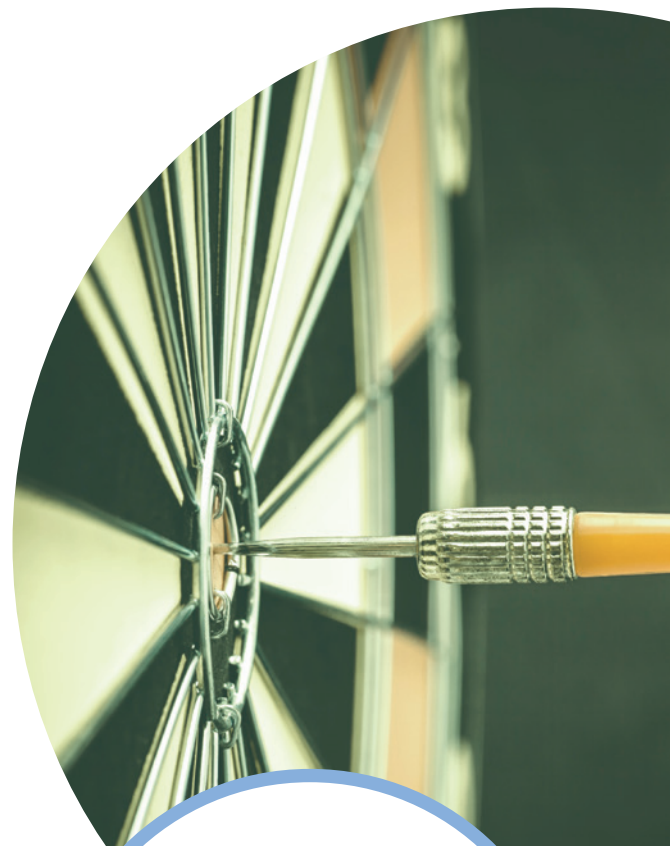
#### Quality, Attentive, Responsive Business Services

We pledge to provide quality, attentive, responsive business services.

**Individual Attention:** We will treat each client with the utmost care; we will develop and maintain a strong personal relationship; we will provide service with a commitment to professionalism, trust and the highest level of personal and professional integrity.

**Responsive:** We will respond to a client's urgent need immediately; we will return all voicemail and e-mail communications within 24 hours; we will deliver and review all work product on a timely and as agreed basis.

**Proactive:** We are committed to understanding the goals and needs of our clients, responding to such needs with our best service, advice and products. We will strive to provide our clients with innovative solutions and opportunities to improve and grow their business.



**Our guarantee:**  
If you are not satisfied with our **responsiveness and the service** we have provided, tell us immediately – we will correct the situation to your satisfaction.

## Human Rights Policy

Please refer to **Appendix E** for a complete copy of our Human Rights Policy.

## Ethics

### Professional Conduct and Ethics

The success of CBIZ is directly tied to our reputation for integrity in the marketplace. We earn loyalty and trust because we are honest, dependable, reliable and responsible. We adhere to the highest ethical standards, more than merely required by law or expected by others, because it is the right thing to do and makes good business sense. We take great pride in our reputation for integrity.

Simply stated, we act with integrity by incorporating the values of honesty, fairness, respect, loyalty and cooperation into all our business decisions and actions.

These values serve as the foundation for the following ethical business principles:

- We treat people with dignity and care.
- We transact business fairly and honestly, promoting the Company's best interests, without regard to our personal interests.
- We safeguard all the Company's property and information and treat others' property and information with the same respect.
- We work to enhance the quality of life in the communities we serve.
- We comply with the law.

To help guide team members to make the best possible decisions, CBIZ has created a Code of Professional Conduct and Ethics Guide. Although this is not a detailed manual for resolving every question or conflict, the Code of Professional Conduct and Ethics Guide has been designed to provide useful guidance about the way associates are to do business every day. It is the responsibility of our team members to read and understand the Code, as well as other CBIZ policies and guidelines, and comply with them both in letter and spirit.

Please visit [www.cbiz.com/corporate-governance-highlights](http://www.cbiz.com/corporate-governance-highlights) to view our Code of Professional Conduct and Ethics.

## Governance

### Board of Directors

Please visit [www.cbiz.com/about-us/executive-team](http://www.cbiz.com/about-us/executive-team) for more information on our Board of Directors, pictured below.



As a publicly traded company, it is CBIZ's goal to conduct our business in a manner that will maintain and improve our good reputation. To provide shareholders with more information regarding the means by which we hope to achieve our goal, CBIZ has made the following charters available: Audit Committee, Compensation and Human Capital Committee, and our Nominating and Governance Committee. To view these charters, please visit [www.cbiz.com/corporate-governance-highlights](http://www.cbiz.com/corporate-governance-highlights).



### Whistle Blower Hotline

The CBIZ Employee Ethics Hotline is available 24 hours a day, seven days a week. Callers remain anonymous and any employee who reports possible or actual wrongdoing in good faith will not be retaliated against if they choose to share their identity. Associates may report a complaint by calling 1-866-255-2611 or by visiting the Security Voice website at [www.securityvoice.com/reports](http://www.securityvoice.com/reports). The CBIZ Internal Audit Department will provide the Audit Committee with a report of all complaints received and the results of its investigation.



### Terms of Use & Privacy

To view our Terms of Use & Privacy Policy, please visit [www.cbiz.com/terms-conditions](http://www.cbiz.com/terms-conditions). Our Website Privacy Policy is available at [www.cbiz.com/privacy-policy](http://www.cbiz.com/privacy-policy).

# Our People Matter

## “Our People Matter” is one of our five Core Values. We pledge to:

- Commit to the personal and professional growth of our team members.
- Respect individuality and diversity and extend dignity to all.
- Value and recognize the hard work, effort and contributions of our team members.
- Support the communities in which our team members live and work.
- Understand the importance of balance among our personal, community and professional lives.

As such, the overall wellbeing of our team members is critically important to us; therefore, we advocate a wellbeing philosophy focused on five key areas: purpose, social, financial, community and physical.

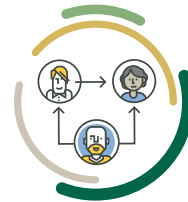


## Pillars of Wellbeing



### Purpose

Liking what we do each day and being motivated to achieve our goals



### Social

Having a strong sense of community at work as well as supportive relationships and love in our lives



### Financial

Effectively managing our economic life to reduce stress and increase security



### Community

The sense of engagement and involvement we have with the area where we live



### Physical

Striving for optimal health and enough energy to get things done on a daily basis

## Workplace Awards

Our commitment to our people has resulted in being recognized with workplace awards by various organizations and media publications throughout the U.S.



### 8 National Workplaces

- 2019 Top Entry Level Employer
- 2019 Top Intern Employer
- Best Workplaces for Consulting and Professional Services
- 2019 America's Best Mid-Size Employers
- 2019 Workplace Excellence Seal of Approval
- 2019 Best Places to Work in Insurance
- 2019 U.S. Insurance Awards Community Outreach Project of the Year
- Smart Women Progressive Organization Award



### 2 National Health and Wellness

- 2019 Health & Wellness Seal of Approval
- 2019 Healthiest 100 Workplaces in America



### 10 Certifications and Rankings

- Great Place to Work Certification
- 2020 Vault Accounting 50
- 2020 Most Prestigious Accounting Firms
- 2020 Best Accounting Firms for Forensic Accounting
- 2020 Best Accounting Firms for Tax Accounting
- 2020 Vault Best Accounting Internships
- 2020 Vault Best Consulting Internships
- Best Practices for Supporting Workers 50+
- 2020 Vault Top 100 Best Internships
- 2020 Women on Boards



### 3 Credibility

- Top 100 Retirement Plan Advisers
- Top RIA Aggregators
- 2019 Top Defined Contribution Multi-Office Firm



### 18 Local Health and Wellness

- Alpharetta, GA
- Atlanta, GA
- Chicago, IL
- Cleveland, OH
- Columbia, MD
- Cumberland, MD
- Denver, CO
- Dublin, OH
- Fairborn, OH
- Kansas City, MO
- Los Angeles, CA
- Maple Grove, MN
- Minneapolis, MN
- Naperville, IL
- New York, NY
- Philadelphia, PA
- Phoenix, AZ
- Plymouth Meeting, PA
- Providence, RI
- San Francisco, CA
- San Jose, CA
- South Florida
- St. Louis, MO
- Woodstock, GA

## 22 Local Office Workplaces

- |                |                |                   |                      |                |
|----------------|----------------|-------------------|----------------------|----------------|
| Akron, OH*     | Cleveland, OH* | Kansas City, MO   | Overland Park, KS    | San Jose, CA   |
| Alpharetta, GA | Columbia, MD   | Los Angeles       | Philadelphia, PA     | St. Louis, MO  |
| Atlanta, GA    | Cumberland, MD | Maple Grove, MN   | Phoenix, AZ*         | Tampa Bay, FL* |
| Boca Raton, FL | Denver, CO     | Minneapolis, MN   | Plymouth Meeting, PA | Tucson, AZ*    |
| Boston, MA*    | Dublin, OH     | Naperville, IL    | Providence, RI*      | Uniontown, OH  |
| Brentwood, TN  | Encino, CA     | Network Solutions | San Diego, CA        | Woodstock, GA  |
| Chicago, IL*   | Fairborn, OH   | New York, NY*     | San Francisco, CA    |                |

\*Multiple award winner

## Purpose

Liking what we do each day  
and being motivated to  
achieve our goals



## Onboarding and Training Programs

All new employees are welcomed into CBIZ through onboarding, a process during which we integrate new team members into the organization, prepare them to succeed at their job and encourage them to become fully engaged, productive members of the company. We provide access to opportunities which allow our associates to further develop their talents and abilities.

For detailed information about content and types of training, please refer to **Appendix A** for our Enterprise-Wide Training Brochure.



## Steven L. Gerard Legacy Award

The Steven L. Gerard Legacy Award (SLG Award) was established in 2016 in honor of the tremendous impact that our former CEO has had on our company. Nowhere is his impact more evident than in the development of the values and culture we now collectively embrace.

Each year, we honor Steve's legacy by giving the SLG Award to the employee who has most exemplified one or more of our core values.



This award is designed to recognize one team member who goes above and beyond expectations. The recipient will receive recognition on our intranet, a trophy for their office, and their name engraved on the permanent trophy in our corporate office in Cleveland. Our 2019 Award recipient was Catherine Latham, Managing Director, CBIZ MHM, Boston.



### Service Anniversary Program

Our Service Anniversary Program is designed to recognize and celebrate our team members as they reach their milestone service anniversaries (i.e. 5, 10, 15, 20 and 25 years). The hard work and dedication of our team provide critical support to our clients and help CBIZ grow; for that, we are truly thankful.

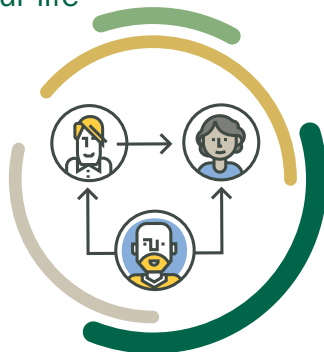
### Individual External Recognition

Our CBIZ Women’s Advantage program is proud of the recognitions our professionals have received for their contributions to diversity, their professions, clients and to CBIZ. A growing number of CBIZ professionals have been recognized in their local communities.

Please refer to **Appendix B** for a listing of our professionals who were recognized in 2019.

## Social

Having a strong sense of community at work as well as supportive relationships and love in our life



### Our “Great People, Great Place” Program

The commitment to our people means making CBIZ a great place to work. With this philosophy in mind, we established our Great People, Great Place (GP2) program in 2006. GP2’s mission is to ensure that we create a place of which our team members are proud.



CBIZ’s commitment to making our company a great place to work



Defining our company and establishing a common culture



An expression to our team members that we care



## Communication

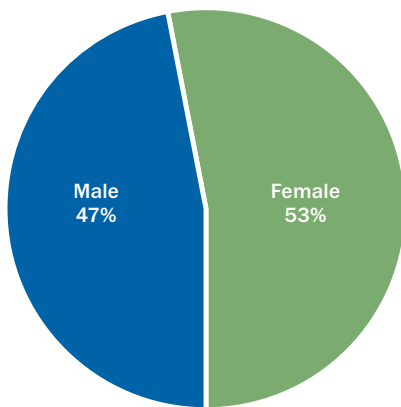
Feedback from our team members emphasizes that frequent and varied forms of communication are critical to sustaining a cohesive environment.

Among our many methods of communication are in-person meetings, our company intranet, quarterly communications and our open-door policy for suggestions.

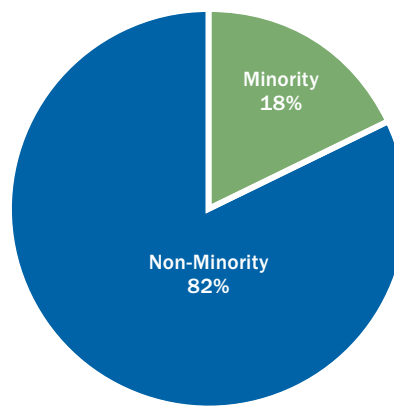
## Diversity

### Metrics

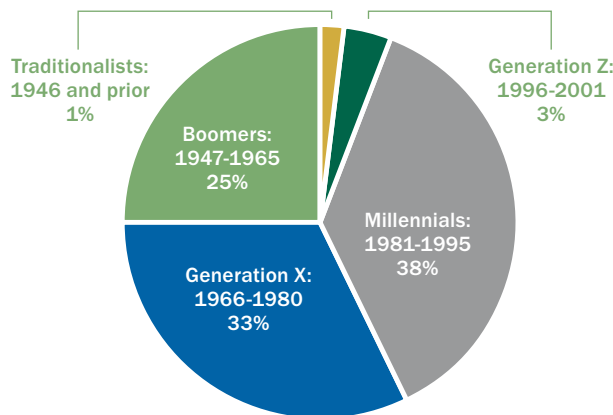
PERCENTAGE OF TEAM MEMBERS BY GENDER



PERCENTAGE OF TEAM MEMBERS BY ETHNICITY



PERCENTAGE OF TEAM MEMBERS BY GENERATION



As of January 2020

### CBIZ Women's Advantage

CBIZ Women's Advantage (CWA) provides professional training, development, mentorship, recognition, and career enhancement opportunities to our professionals, and brings these same elements to our business communities through a variety of educational and networking events.

#### Our Goals:

- Attract, retain and engage talented women and a diverse workforce
- Provide personal, professional and business development training
- Recognize our people for their commitment to diversity, their clients, professions and to CBIZ
- Champion CBIZ's mission, vision, values and strategic goals
- Raise up the next generation of leaders
- Encourage career intention and visibility
- Support the communities in which we live and work

Please visit [www.cbiz.com/cwa](http://www.cbiz.com/cwa) for more information on CBIZ Women's Advantage.

### Recruiting

Our National Recruiting Office (NRO) builds outreach networks to identify qualified minority, military, disabled, female or LGBT candidates.

### Personal Development

All team members are required to complete courses on each of the following subjects: ethics, anti-harassment and diversity.

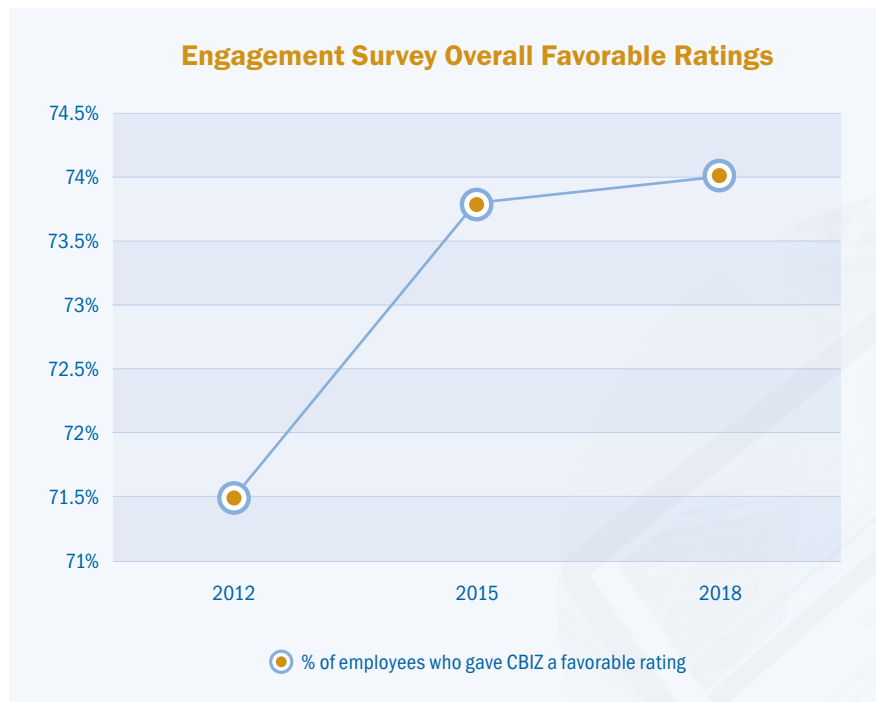


Team members from CBIZ Northeast Ohio make a check presentation to Mellony Butler (center) of Dress for Success.

## Engagement

Our team members' voices are important to us. Every three years, we distribute a company-wide employee engagement survey to help us gauge how we fare as an employer. The ideas expressed within the surveys by our team have resulted in establishing several new programs and policies. Among the most popular are:

- CBIZ Women's Advantage
- Domestic partner benefits
- Employee referral bonus program
- Discounted employee stock purchase plan
- Annual CBIZ National Food Drive
- Parental leave programs
- CBIZ Cares
- Flexible work arrangements



## Financial

Effectively managing our economic life to reduce stress and increase security



### Guiding & Rewarding Performance

Performance management is the process used by CBIZ to ensure all team members are aware of the level of performance expected in their role as well as any individual goals that are required to achieve overall organization objectives.

We also embrace a “**Pay for Performance**” philosophy, providing our team with opportunities to enhance their cash compensation through competitive merit increases as well as annual bonuses. Our compensation plans are designed to reward and incentivize our professionals on specific criteria and competencies related to their role and level within the organization.

Incentives and bonuses are also awarded for achieving professional certifications, including pay for study materials, exams and compensation for time taken while taking exams.

### Income Protection

CBIZ provides income protection for our team when unexpected and unfortunate circumstances arise. Included in our income protection plans are:

- Paid sick leave
- Salary continuation plan
- Group long-term disability insurance
- Group life insurance and accidental death and dismemberment benefits
- Business travel and accident insurance
- Voluntary life, dependent life, long-term care, and accident and critical illness insurance
- Small-dollar loans through TrueConnect
- IonTuition student loan repayment platform



## Retirement Readiness

CBIZ offers a variety of benefits and programs to assist our team in preparing for retirement financially and emotionally. Our offerings include:

- No mandatory retirement
- 401(k)
- Matching contribution from CBIZ
- Loan opportunity
- Retirement Video Series – nine short videos addressing topics that we hope will reduce the stress and anxiety of retirement
- Financial Wellness Series - recorded webinars focused on financial wellness, including retirement strategies
- MapMyFinances tool that provides financial wellness score to help ascertain financial health

## Financial Perks & Programs

We are pleased to offer a number of perks and programs to help our team members’ financial wellbeing. Please refer to **Appendix C** for an overview of these items.



**FINANCIAL**

Effectively managing your economic life to reduce stress and increase security

**Salary Continuation:** Provides partial income per week for up to 180 days in the case of illness or accident.

**Long Term Disability:** Provides partial income continuation after 180-day elimination period while continuously disabled, up to normal retirement age.

**Cafeteria Plan (Section 125):** Provides pre-tax savings for reimbursement of medical, dental and vision expenses not covered by insurance, adoption expenses and dependent daycare expenses.

**Health Savings Account (HSA):** CBIZ offers payroll deductions to an HSA, allowing you to save money on a pre-tax basis to pay for qualified medical expenses you incur while meeting your QHDP deductible.

**Transportation Fringe Benefit (Section 132):** CBIZ allows you to save money on a pre-tax basis to cover parking expenses at or near your office or mass transit expenses you incur to commute to work.

**Retirement Plan:** Employees contributing to the CBIZ retirement plan make automatic payroll deductions into investment accounts and enjoy a competitive matching contribution following one year of service.

**Group Life and AD&D:** Term life insurance and accidental death and dismemberment benefits for your beneficiary in the case of your death or permanent injury while employed.

**Voluntary Life, Accident and Critical Illness Plans:** CBIZ offers Voluntary Life, Dependent Life, Long Term Care, Accident and Critical Illness Insurance.

**Travel and Accident Insurance:** Personal insurance coverage available while traveling on authorized company business.

**Employee Stock Purchase Plan:** Employees can purchase CBIZ stock at a discounted price through the convenience of payroll deduction.

**Aflac:** Aflac provides supplemental insurance to help pay out-of-pocket medical expenses you may incur.

**LifeLock:** LifeLock helps protect your identity and credit by monitoring for identity theft and threats.

**Personal Insurance Services:** Professionals who review your existing policies, provide recommendations for improving coverage where applicable (while often times improving your rates) and offer you peace of mind knowing you are adequately insured.

**TrueConnect:** TrueConnect™ is a voluntary benefit program that provides safe, small-dollar loans to help you through a tough time. Loans from \$1,000 to \$5,000 are available to qualifying employees and are conveniently repaid through automatic payroll deductions for no longer than 12 months.

**IonTuition:** IonTuition eases the stress of repaying student loan debt and planning for college. All employees are eligible for IonTuition’s online student loan repayment management platform.

## Physical

Striving for optimal health and enough energy to get things done on a daily basis



### Elements of Physical Wellbeing

Since 2001 we have sponsored programs to assist our employees and their spouses/domestic partners to take action to achieve good health. Our programs offer a platform of support as well as tools and resources for employees to move forward, regardless of where they may be on the spectrum of personal health.



#### Employee Benefits

CBIZ offers medical, dental and vision coverage. Each of these benefits is designed to focus attention on maintaining or improving overall health. Please refer to **Appendix C** for an overview of our benefits.



#### Rally Wellness

Rally Health is a wellness program hosted on our insurance provider's website that tracks our personal scorecards, health risk assessments, biometric screenings and premium discounts. Through Rally, we provide free access to telephonic wellness coaching programs on a variety of health-related topics. Points earned through Rally also contribute to a discount on our team members' health insurance.



#### Employee Assistance Program

For mental health, our Employee Assistance Program provides access to short-term counseling for our associates and their dependents to help manage challenges at home and in the workplace.

# Our Community

We pride ourselves on being a diverse organization that builds long-lasting relationships with and provides support for the communities in which we live and work, as well as national organizations. To fulfill this commitment, we launched our CBIZ Cares Program to encourage participation in volunteering, fundraising, our National Food Drive, and our support of Dress for Success.

In 2019,  
**we volunteered  
nearly 5,500 hours**  
in our communities.



## Volunteering

Beginning in 2016, and in honor of our 20th anniversary, we wanted to give back to the communities in which we live and work. We embarked on a project we named CBIZ Cares and encouraged all of our offices to have their team members volunteer up to five paid hours at a nonprofit organization selected by that CBIZ location. CBIZ Cares was such a success that we decided to make it an annual initiative!

The program remains the same in that each local team volunteers at an organization (or multiple organizations for our larger offices) of their choice. A CBIZ Cares leader for each location identifies and selects volunteering opportunities with nonprofits and subsequently organizes CBIZ team members to participate in the project.







In 2019, **our team members donated a total of \$91,345.48** to charitable organizations.

### Fundraising

We also support fundraising initiatives such as hosting a local charitable campaign, providing funding for a CBIZ team to participate in a walk/race benefiting a nonprofit, etc.

Organizations supported by CBIZ offices nationwide include, but are not limited to, the following: United Way, American Heart Association, Make-A-Wish, Junior Achievement and The Humane Society.

POUNDS OF FOOD COLLECTED	
2009	403,146 pounds
2010	462,099 pounds
2011	576,289 pounds
2012	648,034 pounds
2013	650,776 pounds
2014	747,743 pounds
2015	1,026,140 pounds
2016	1,051,864 pounds
2017	1,140,960 pounds
2018	1,021,586 pounds
2019	1,072,252 pounds

*More than 8 million pounds of food across the country*

### National Food Drive

A key element of CBIZ Cares is our annual CBIZ National Food Drive, which was established in 2009. During this two-week event each fall, we ask our team members for monetary or non-perishable food donations to provide to their local food bank.

We make the Food Drive fun by sponsoring a friendly competition between offices. Each office is categorized by employee count and the top two offices in each category receive a prize based on the greatest amount of food and monetary donations, as measured by the total pounds collected divided by employee count.



### CBIZ Women's Advantage & Dress for Success

In partnership with our CBIZ Women's Advantage program, we sponsor an annual campaign to benefit Dress for Success (DFS). DFS is an international not-for-profit organization that empowers women to achieve economic independence by providing a network of support, professional attire and the development tools to help women thrive in work and in life.



Participating CBIZ offices have local committees to develop creative campaigns for fundraising, clothing and accessory drives.

Please refer to **Appendix D** for an infographic that further details our involvement with Dress for Success.



In 2019, we donated  
**\$139,000**  
and more than  
**1,400 clothing  
or accessory items**  
to DFS affiliates  
nationwide.

# Our Environment

## Sustainability Policy

Please refer to **Appendix F** for a copy of our Sustainability Policy.

## Green Team

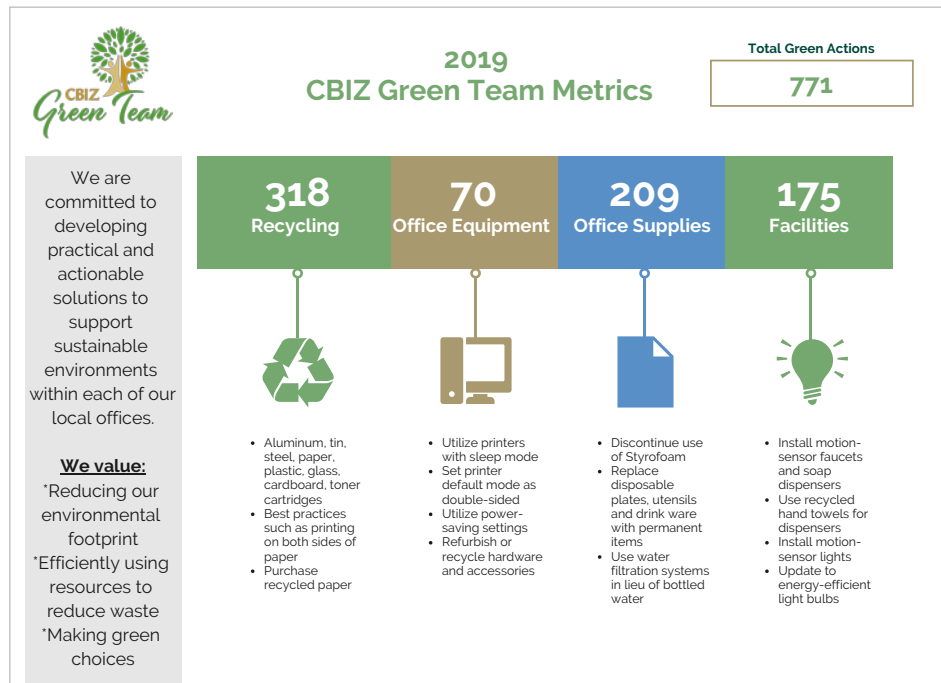
We also care about being environmentally friendly. In 2018, we renewed our commitment to our green initiatives and launched a national Green Team, comprised of volunteers from across CBIZ who are passionate about enhancing our green efforts. Our goal is to establish practical and actionable solutions to support sustainable environments within each of our local offices.

### We value:

- Reducing our environmental footprint
- Efficiently using resources to reduce waste
- Making green choices

### We endeavor to do this because our associates care about working in a great place that values:

- Restoring and protecting our environment
- Opportunities for making green choices



# Appendix A



## Enterprise-Wide Training Brochure

CBIZ

# Enterprise-Wide Training



®

Accounting | Insurance | Advisory



# CBIZ Enterprise-Wide Training

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## HR: Training & Professional Development Programs

### CBIZ Leadership Council (CLC)

The CBIZ Leadership Council was established as a means to recognize and develop high-performing individuals who have demonstrated success in their current roles and have the potential to assume even greater leadership responsibility in the future. Its purpose is to:

- Better inform current and future CBIZ leaders of the opportunities and certain challenges facing our company.
- Create a forum in which strategic thinking and ideas for growth and success can be generated and discussed.
- Provide a mechanism to solicit and consider varying views on major corporate issues and initiatives.
- Provide an opportunity for current leaders to expand their network across other business lines.

Members of the CLC are expected to participate in seven strategy meetings, each lasting approximately one and a half days. They are nominated to the class by either their divisional practice leader or a corporate sponsor. Final selection to the class is made by our CEO.

### Enrichment Series

The Enrichment Series is a collection of programs designed to support and enhance the personal and professional growth of our associates. The areas of focus are supervisory skills, diversity awareness and leadership competencies, as well as customer service and personal work skills. The following courses are CBIZ-developed and led classroom style by CBIZ HR Business Partners:

#### Supervisory Skills

- Behavioral Interviewing Skills
- Effective Performance Management Systems
- Effectively and Fairly Conducting the Disciplinary Process
- Emotional Intelligence
- HR 101: Guidelines for Managing Associates Fairly
- Managing Generational Differences

#### Diversity & Inclusion

The goal for diversity awareness training, a three-hour interactive classroom session entitled "Succeeding in a



Diverse Environment,” is to sensitize our associates to the opportunities and issues inherent in our ever-changing workforce and marketplace. This is part of an ongoing process intended to develop a more inclusive organization through stronger working relationships – both inside and outside the organization.

### Leadership

CBIZ HR Business Partners have access to a library of 70+ HRDQ experiential learning courses that they may customize and deliver in the classroom. In addition, most HRBPs are certified instructors with AchieveForum, a leader in helping organizations translate business strategies into business results by developing the skills and performance of their people. A sampling of the courses:

- Principles and Qualities of Genuine Leadership
- Providing Constructive Feedback
- Developing Others

### Customer Service

There are Miller Heiman Group-authored courses that build critical service skills to aid our associates in the attainment and retention of loyalty among our clients. A sampling of the courses:

- Reaching for Stellar Service
- Caring for Customers
- Teaming Up for Seamless Service

There are also related modules for those who supervise our customer service professionals.



### Work Skills

There are numerous HRDQ, AchieveForum and CBIZ-developed courses designed to assist associates of any level to build skills and strategies in order to be even more productive and successful. A sampling of the courses:

- Succeeding amidst Generational Differences
- Listening in a Hectic World
- Speaking to Influence Others
- Personal Strategies for Navigating Change
- Managing Life Outside Work: Handling Emergencies and Resisting Temptations

### Presentation Skills Workshops

In this day-long workshop, participants learn how to effectively and quickly develop well-organized presentations. They learn how to create and maintain a positive impression throughout the presentation and deliver presentations with impact, including general guidelines, handling nerves, answering questions effectively and designing visuals. The small class size allows each person to deliver two presentations with videotaping and playback review with constructive critiquing by the external CBIZ consultant.

### MyLearn (Learning Management System)

This platform allows us to offer and track training across the enterprise, as well as develop career paths for our associates. It is a one-stop shop for onboarding, compliance courses, self-study courses, webinars, tutorials and training resources, and includes a calendar with registration capabilities for instructor-led sessions. Also housed in the MyLearn library are 70+ searchable HRDQ people skills courses like communication, emotional intelligence, collaboration, critical thinking, decision making, conflict resolution and more. Finally, MyLearn includes a direct link to MyCPE, our system which houses Continuing Professional Education (CPE) credits for our Financial Services associates.

### California & New York Anti-Harassment Training

The state of California requires two hours of interactive training every two years for all supervisors and one hour of interactive training for non-supervisory associates. The state of New York and New York City have similar requirements but on an annual basis. Through an online format provided by Emtrain, all California and New York associates complete harassment prevention training.

## Financial Services: Learning & Professional Development Programs\*

### Core National-Level Technical Learning

These group-live, instructor-led programs provide technical training in audit and accounting (A&A) and/or taxation for external client-facing employees below the manager level. Levels 1 - 3 are four- to five-day technical training programs intended for Associates with two years or less of experience. The Senior Associate Conference is a three-day conference with a mix of general sessions, electives and sessions based on experience level.

- Level 1: For Associates with zero to three months of A&A and/or tax experience who have not yet been through a busy season.
- Level 2: For Associates with approximately one year of A&A and/or tax experience and who are still primarily working under the supervision of others.
- Level 3: For Associates with approximately two years of A&A experience (who are managing or preparing to manage their own engagements with minimal supervision and are supervising or preparing to supervise others) and/or tax experience (who are preparing more complicated returns, reviewing basic returns, interfacing with clients and beginning to research and assist with tax planning engagements).
- Senior Associate Conference: For Senior Associates with approximately three or more years of A&A experience (who have been managing their own engagements and/or have been supervising others) or tax experience (who have been preparing complicated returns, reviewing basic to intermediate returns and have completed more complex research and planning projects). A&A Senior Associates generally attend the Senior Associate Conference until promoted to Manager. Tax Senior Associates attend the entire conference for three years and then may attend the electives and general session in subsequent years until promoted to Manager.

### MHM Technical Symposium

This three-day A&A technical conference is primarily designed for attest practice Managers and Senior Managers, although attest Shareholders may also attend. The symposium includes a combination of general session

topics and electives based on industry and/or specialized accounting or auditing issues.\*

### Technical Webinars & Self-Study Libraries

Financial Services provides over 50 technical webinars, covering accounting, auditing, tax and industry-focused topics. In addition, employees have access to various self-study libraries, offering hundreds of courses to further develop one's technical skills.

### Associate Professional Development & Senior Professional Development Programs

These programs are business unit-delivered professional development programs designed to supplement Core National-Level Technical Training by providing a platform for Associates' and Senior Associates' growth as professionals and leaders.

### Manager Professional Development

#### New Manager Orientation

This two and a half-day session is designed for all newly hired and newly promoted Managers. The curriculum focuses exclusively on professional development and covers such topics as Making the Transition to Manager, Delegation, Increasing Communication Success with DISC, Proactive Client Service and Giving Feedback. The session is highly interactive and uses group projects and presentations to facilitate learning.

#### Experienced Manager Workshop Series

This one-day session is intended to help experienced Managers and Senior Managers further build the behavioral skills necessary to succeed in that role. Each program focuses on one core skill and rotates from market to market. Current workshops focus on presentation skills, delegation for employee growth, or productive conflict and crucial conversations. All experienced Managers and Senior Managers are generally expected to attend one workshop per year.

#### Tomorrow's Rainmakers

This 18-month program targeted to Managers and Senior Managers is delivered within each business unit. The course uses a relationship-based approach to strengthening ties with existing clients and attracting new clients.





## Emerging Managing Director Academy (EMDA)

This five-session program is intended for Senior Managers and Directors who have shown the potential to become Managing Directors (MDs). The program is designed to ensure the candidates have clear awareness of the skills, knowledge and expertise required to make a successful transition and achieve both personal and professional success as an MD. Over the course of the program, the candidates will focus on the MD competencies, including self-development, leadership development, business development, organizational awareness and business skills. EMDA candidates are nominated by their Senior Managing Director and approved by CBIZ MHM leadership.

## CBIZ & MHM Biennial Conference

This is a three-day event designed for Tax, Attest and Forensic Financial Services Managing Directors/ Shareholders. At this conference, leadership makes presentations on the “state of the union” and shares visions of our business strategy. The curriculum also includes a variety of high-level technical topics blended with sharing of internal best practices, provided in both a general session and breakout-session format. Participants also gain the opportunity to hear from and network with leaders of other CBIZ business segments, which ultimately assists in better serving our clients.

## Internship Program

In many locations we offer Spring and Summer internships for students considering a career in public accounting. They receive the same experience as our full-time associates. During their internship they gain experience in tax and A&A work. We also work with them on socialization and goal setting and pair them up with buddies and mentors to help set them up for success. Our goal is to extend employment offers to our interns and have them move up through the company as their careers progress.

## CPA Designation Support

CBIZ encourages associates to attain their CPA designation and provides support for those who opt to do so. CBIZ has a direct-pay arrangement with our vendor for a review course and compensates the associate in accordance with his/ her regular base wage while taking the CPA exam (up to 32 hours) if the exam is taken during the normal workweek. CBIZ reimburses the associate for up to four application fees, the exam fees for up to eight sections, required fingerprinting fees, mileage associated with the commute if outside the

metro area, lodging and meals if an overnight stay is required, and one instance of the AICPA Professional Ethics self-study course or state equivalent (as applicable). CBIZ awards a CPA exam bonus between \$2,000 and \$4,000.

## Valuation Designations Support

CBIZ encourages our Valuation practice employees to pursue the following designations, as applicable:

- Real Estate Valuation Appraisal Trainee
- State Certified General Appraiser
- Member of the Appraisal Institute (MAI)
- American Society of Appraisers (ASA)
- Business Valuation Appraisers
- Business Valuation Professional AM or ASA Accreditation
- Machinery and Technical Specialties (MTS) AM or ASA Accreditation
- American Society of Appraisers (ASA)
- Certified Entity and Intangible Valuations (CEIV) Credential
- CFA Institute Chartered Financial Analyst (CFA)

CBIZ reimburses expenses without regard to scores received for up to two exam application and testing fees, mileage associated with the commute to and from a testing site location outside of metro areas, lodging and meals if an overnight stay is required, and if the class is not offered in the local area of the employee an alternative location will be reviewed. In addition, a bonus is awarded to each eligible employee who successfully completes these designations as a regular full-time or part-time employee: Certified General Appraiser Designation \$2,500, MAI Designation \$5,000, ASA designation \$4,000, CEIV designation \$2,500 and CFA designation \$5,000.



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## Benefits & Insurance: Organization & Talent Development

### Leadership Development

The leadership development courses are offered across the country and are required for anyone who holds a management or supervisory position. To complete each course successfully, application of the information learned must be demonstrated.

### Foundations of Management

Foundations of Management focuses on helping leaders address the key opportunities and challenges when managing individuals. This very intense two-day course covers manager vs. leader, types of power and the entire performance management cycle, which includes interviewing, performance planning, coaching, counseling and performance appraisal meetings.

### Foundations of Leadership

Foundations of Leadership builds on the knowledge learned in Foundations of Management and focuses on areas of leading individuals that are more complex. Included in the class is a discussion of a variety of leadership models, creation of a personal leadership philosophy and learning a variety of tools to approach daily leadership challenges, including managing priorities, delegation, giving and receiving feedback, and building a strong, positive culture. Lastly, each leader receives an introduction to both change and conflict resolution.

### Professional Development

Online development opportunities focusing on key topics, ranging from communication to project management to negotiation, are provided to all in our “Professional Development Toolboxes.” Articles, videos, assessments and book recommendations are included.

### Organization Development

Coaching is offered for a number of leaders across the division to strengthen effectiveness and provide additional growth opportunities. Approval is required.

Customized Teambuilding is provided to teams who seek to continue to improve. Approval is required.

## CBIZ HCM

Through the CBIZ HCM Training Program each associate is assigned to a training curriculum based on their position. Each curriculum contains specific training requirements necessary to become an expert in their role. The extensive training library consists of courses ranging from department/job specific to customer service and soft skills. The training classes include instructor-led, on-the-job, seminars and computer-based training. In addition, in-house training sessions or mentoring is offered to assist individuals in preparing for their CPP or FPC certification exams.

Additionally, the American Payroll Association has approved 32 CBIZ Payroll courses for recertification credits. Each year, Approved Provider status is designated by the American Payroll Association through an application process. CBIZ continually meets the criteria to become an Approved Provider, allowing us to issue recertification credit hours to associates or clients. CBIZ HCM also offers employees the opportunity to obtain their SHRM-CP, SHRM-SCP and CPA designations.

## CBIZ Benefits & Insurance Services Sales & Training Conferences

These biennial two-day events focus on professional development, specifically business development and industry updates. In addition, every other year each Benefits & Insurance Services business (Employee Benefits, Human Capital Management, Talent and Compensation Solutions, Retirement Plan Services and Property & Casualty) holds a sales and training conference focusing on industry-specific content.

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## CBIZ Women’s Advantage

CBIZ Women’s Advantage (CWA) celebrates the uniqueness of the woman business professional. Internally, we direct the development of our women professionals through focused leadership, mentoring and networking, as well as personal and professional development. Following is an overview of the development programs.

### Networking Circles I (NCI)

The focus of NCI is personal development and a desire to create opportunities for networking and skill building among



all CBIZ women. NCI is a year-long program, involving a series of facilitated small-group meetings. This program includes:

- Networking Skills
- Developing and Strengthening Influence Skills
- Effective Communication Skills: Listening
- Effective Communication Skills: Presentation Techniques
- Managing Success in Your Professional and Personal Life – Planning, Prioritizing, Work Practices, Boundaries, Delegation
- Managing Success in Your Professional and Personal Life – Work/Life Roles and Integration, Time Management, Goals
- Advocacy: Marketing Yourself and CBIZ

## Networking Circles II (NCII)

The focus of NCII is the professional development of CBIZ women who are emerging business developers and client-facing professionals. The program is designed to develop or further enhance client service and business development skills, leading to revenue growth of CBIZ. NCII is a year-long program, involving a series of facilitated small-group meetings. This program includes:

- The CBIZ Trusted Advisor
- Salespeople and Sales Styles: Born or Made?
- DISC: Understanding Your DISC Reports – Your Natural Behavior Tendencies
- DISC: Adapting Your Selling Style to Fit Your Customer's Buying Style
- The Trust Equation
- From Difficult Conversations to Learning Conversations
- Resolving Objections
- Resiliency
- Your Path to Success

## CWA Book Clubs

CWA believes that reading good books can challenge and inspire us, yet the experience is not complete until you've shared your thoughts with someone else who has read the book! CWA-sponsored book clubs are open to any CBIZ associate. Participants commit for one year. The clubs choose the books with content focused on professional development topics. CWA purchases the books and the leader is selected from among the participants.

## Additional Training Programs

### New Horizons Computer Learning Programs

CBIZ partners with New Horizons Computer Learning Centers to provide a national discount to all associates for end-user application, business skills and technical classroom training at any one of New Horizons' 300 centers. CBIZ associates may choose from a wide selection of technical classes and certification packages. New Horizons utilizes the traditional classroom-delivery method – instructor, lecture and demonstration – followed by student practice through hands-on exercises. Students also receive a learning guide and electronic version of the user manual.

### CBIZ Channel

The CBIZ Channel, located on CBIZ Central, provides access to a wide array of resources in video format, including training on CBIZ's software tools, internal and external webinar recordings, and messages from our CEO. A few of the most popular sessions include:

- Biz Tips
- CBIZ Mobile
- Concur
- HCM
- Salesforce.com
- TRACS

### Social Media

Access CBIZ Central > Corporate > Marketing > Social Media to learn about various CBIZ social media, guidelines for sharing thought leadership pieces and tips for safe social networking. In addition, there are numerous educational programs, such as:

- Digital Marketing Orientation Video
- How to Use Social Media for Business Development
- How to Use Frontline Selling
- How to Participate in the CBIZ Twitter Program
- LinkedIn: How to Utilize Proven LinkedIn Techniques
- LinkedIn: 10 Steps to an Effective LinkedIn Profile





**Accounting | Insurance | Advisory**

*\*MHM (Mayer Hoffman McCann P.C.) is an independent CPA firm that provides audit, review and attest services, and works closely with CBIZ, a business consulting, tax and financial services provider. CBIZ and MHM are members of Kreston International Limited, a global network of independent accounting firms.*

# Appendix B



## CWA External Recognitions



# CBIZ Women's Advantage Celebrates Our Recognized Professionals

CBIZ Women's Advantage is proud to recognize our team members for their commitment and dedication to their clients, professions, communities, and to diversity. We are pleased to highlight the remarkable professionals who help make CBIZ a success by showcasing our 2019 recipients of select awards.

☑ To find out more, please visit [www.cbiz.com/cwa](http://www.cbiz.com/cwa)



**Jerry Grisko**  
Dress for Success –  
Cleveland  
Person of the Year



**Tami Bolder**  
Who's Who  
In Black Cleveland –  
Akron-Canton



**Lisa Burke**  
AICPA Missouri –  
Women to Watch



**Michelle Connor**  
HOMI Furniture's  
Vendor of the Year



**Cheryl Calhoun**  
LA Business Journal –  
Most Influential Women  
In Accounting



**Esther DuVal**  
Women's Division Executive  
of the Year Award, New York  
Institute of Credit (NYIC)



**Wendy Hawn**  
Tampa Bay  
Business Journal –  
People First Awards



**Heather Hernandez**  
San Diego Business Journal  
– Most Influential Women  
In Accounting



**Alex Lanning**  
Ingram's Magazine –  
20 in Their Twenties



**Catherine Latham**  
Steven L. Gerard  
Legacy Award



**Kelly O'Neil**  
LA Business Journal –  
Most Influential Women  
In Accounting



**Cindy Orr**  
NAPA Top  
Women Advisors  
(Captains Category)



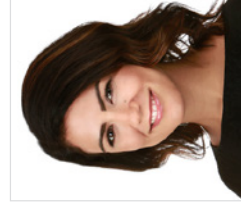
**Rivkie Steinman**  
2019 Notable Women in  
Accounting and Consulting,  
Crain's New York Business



**Jia Su**  
2019 Notable Women in  
Accounting and Consulting,  
Crain's New York Business



**Polly Thomas**  
Kansas City Business  
Journal – Women Who  
Mean Business  
Employee Benefit Adviser,  
Top Women in  
Benefit Advising



**Caitlin Waters**  
Greater KC Chamber –  
2019 ATHENA  
Young Professional  
Leadership Award



**Brenda Verdusco**  
San Diego Business Journal  
– Most Influential Women  
In Accounting



**CWA**  
Smart Woman Awards –  
Progressive  
Organization Award

# Appendix C



## Employee Benefits Program



# CBIZ Employee Benefits Program



## PURPOSE

- 529 Plan
- Education Assistance Program
- Employee Assistance Program
- Service Anniversary Program



## SOCIAL

- Flexible Work Arrangements
- Paid Time Off
- Parent Program
- Pregnancy Disability Leave
- Parental Leave
- Holiday Savings Plan
- Great People, Great Place



## FINANCIAL

- Salary Continuation
- Long Term Disability
- Cafeteria Plan
- Health Savings Account
- Transportation Fringe Benefit
- Retirement Plan
- Group Life and AD&D
- Voluntary Life, Accident and Critical Illness Plans
- Travel and Accident Insurance
- Employee Stock Purchase Plan
- Aflac
- LifeLock
- Personal Insurance Services
- TrueConnect
- IonTuition



## COMMUNITY

- CBIZ Cares
- CBIZ Women's Advantage
- Care Advantage: SitterCity
- Care Advantage: Years Ahead
- LegalShield
- Pet Assure
- Green Team



## PHYSICAL

- Medical
- Pharmacy
- Rx Savings Solutions
- Rally Wellness Program
- Dental
- Vision
- Discount Vision Plan



**4,800+** ASSOCIATES

**100+** LOCATIONS

**90,000+** CLIENTS



## OUR SERVICES



**FIND YOUR PERFECT FIT**

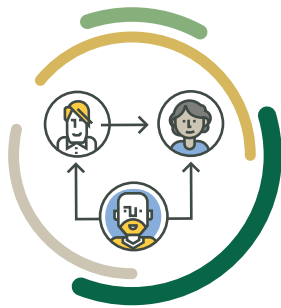
**NATIONAL ORGANIZATION LOCAL FEEL**





## PURPOSE

Liking what you do each day and being motivated to achieve your goals



## SOCIAL

Having a strong sense of community at work as well as supportive relationships and love in your life

**Service Anniversary Program:** The Service Anniversary Program is designed to recognize and celebrate each of our team members as they reach their milestone service anniversaries. The hard work and dedication by our team provides critical support to our clients and helps CBIZ to grow; for that, we are truly thankful.

**Employee Assistance Program:** Provides confidential assessment, short-term counseling and referral services for employees and family members in need of assistance with personal matters.

**Education Assistance Program:** Provides for reimbursement of eligible tuition expenses on a pre-tax basis.

**529 Plan:** Provides the opportunity to save for future higher education expenses through payroll deductions.

**Flexible Work Arrangements:** CBIZ offers arrangements that allow associates the opportunity to modify workloads or work schedules to support personal commitments while maintaining the highest quality service.

**Paid Time Off:** CBIZ offers paid time off for traditional holidays, sick time and vacation time each year.

**Parent Program:** Our Parent Program provides additional support and assistance to new and existing mothers and fathers as they navigate preparing for a new child and managing any challenges that may occur while coming back to work after an extended leave as it relates to children.

**Pregnancy Disability Leave:** Paid leave of absence for the purpose of recovery from the birth of a newborn child.

**Parental Leave:** Paid leave is available to both men and women, including associates in common-law relationships, regardless of whether those relations are of persons of the opposite or same sex, after the birth or adoption of a child.

**Adoption Leave:** Paid adoption leave is available to an eligible associate to provide parental care associated with the adoption of a minor child for bonding purposes.

**Holiday Savings Plan:** Employees choosing to participate make automatic payroll deductions into a savings account that earns interest. Funds may be used for holidays or vacations!

**Great People, Great Place:** The commitment to our people means making CBIZ a great place to work. With this philosophy in mind, we established our *Great People, Great Place* (GP2) program in 2006. GP2's mission is to ensure that, together, our leadership and environment create a place of which our team members are proud.



## FINANCIAL

Effectively managing  
your economic life  
to reduce stress and  
increase security

**Salary Continuation:** Provides partial income per week for up to 180 days in the case of illness or accident.

**Long Term Disability:** Provides partial income continuation after 180-day elimination period while continuously disabled, up to normal retirement age.

**Cafeteria Plan (Section 125):** Provides pre-tax savings for reimbursement of medical, dental and vision expenses not covered by insurance, adoption expenses and dependent daycare expenses.

**Health Savings Account (HSA):** CBIZ offers payroll deductions to an HSA, allowing you to save money on a pre-tax basis to pay for qualified medical expenses you incur while meeting your QHDP deductible.

**Transportation Fringe Benefit (Section 132):** CBIZ allows you to save money on a pre-tax basis to cover parking expenses at or near your office or mass transit expenses you incur to commute to work.

**Retirement Plan:** Employees contributing to the CBIZ retirement plan make automatic payroll deductions into investment accounts and enjoy a competitive matching contribution following one year of service.

**Group Life and AD&D:** Term life insurance and accidental death and dismemberment benefits for your beneficiary in the case of your death or permanent injury while employed.

**Voluntary Life, Accident and Critical Illness Plans:** CBIZ offers Voluntary Life, Dependent Life, Long Term Care, Accident and Critical Illness Insurance.

**Travel and Accident Insurance:** Personal insurance coverage available while traveling on authorized company business.

**Employee Stock Purchase Plan:** Employees can purchase CBIZ stock at a discounted price through the convenience of payroll deduction.

**Aflac:** Aflac provides supplemental insurance to help pay out-of-pocket medical expenses you may incur.

**LifeLock:** LifeLock helps protect your identity and credit by monitoring for identity theft and threats.

**Personal Insurance Services:** Professionals who review your existing policies, provide recommendations for improving coverage where applicable (while often times improving your rates) and offer you peace of mind knowing you are adequately insured.

**TrueConnect:** TrueConnect™ is a voluntary benefit program that provides safe, small-dollar loans to help you through a tough time. Loans from \$1,000 to \$5,000 are available to qualifying employees and are conveniently repaid through automatic payroll deductions for no longer than 12 months.

**IonTuition:** IonTuition eases the stress of repaying student loan debt and planning for college. All employees are eligible for IonTuition's online student loan repayment management platform.



## COMMUNITY

The sense of engagement and involvement you have with the area where you live



## PHYSICAL

Striving for optimal health and enough energy to get things done on a daily basis

**CBIZ Cares:** Each year, CBIZ encourages all associates to volunteer up to five paid hours at a nonprofit organization selected by their CBIZ location.

**CBIZ Women's Advantage:** In partnership with our CBIZ Women's Advantage program, we sponsor an annual campaign to benefit Dress for Success, a nonprofit organization that provides professional attire for job interviewing. Additionally, the organization offers career/life counseling, technology training and mentoring support to thousands of disadvantaged women each year.

**Care Advantage:** Sittercity - A web-based resource to help you find babysitters, nannies, dog walkers, pet sitters and caregivers who can assist with special needs, companion care, homework help and housekeeping.

**Care Advantage:** Years Ahead - Profiles of senior care providers, including photos, details regarding their experience, capabilities, pricing and reviews to help you decide which provider is right for you and your family.

**LegalShield:** As a member of LegalShield, you have access to quality legal services through a nationwide network of provider law firms.

**Pet Assure:** Pet Assure saves you out-of-pocket veterinarian expenses without limitations or expensive premiums for office visits and medical procedures in over 3,000 locations nationwide.

**Green Team:** The CBIZ Green Team was established in honor of our commitment to developing practical and actionable solutions to support sustainable environments within each of our local offices.

**Medical:** CBIZ offers medical insurance for you and your dependents through United HealthCare. Identify health issues early and protect you and your dependents from the financial loss or hardship that can result from illness.

**Pharmacy:** CBIZ offers prescription coverage through CVS/Caremark; affordable medications for you and your dependents.

**Rx Savings Solutions:** Provides help with managing and saving money on prescriptions. This savings program is available at no cost to all members covered under the CBIZ medical plans.

**Rally Program:** Employees enrolled in a CBIZ-sponsored medical plan who choose to participate in the program receive discounted medical premiums.

**Dental:** CBIZ offers dental insurance through Delta Dental of Kansas. Good oral health is critical to the overall health of you and your dependents.

**Vision:** CBIZ offers vision insurance through Vision Service Plan; affordable voluntary coverage for you and your dependents.

**Discount Vision Plan:** If you choose not to enroll in the voluntary vision plan, you are eligible to receive a 15 to 20% discount on eye exams, contact lenses and prescription eyewear obtained through a participating VSP in-network provider.

# Appendix D



## CWA DFS Infographic

# CBIZ and CBIZ Women's Advantage – Proud Partners of Dress for Success

## About CBIZ Women's Advantage

- Established in **2007**
- Active in **45 CBIZ offices** nationwide



- **20 CWA board members** from across all business lines in 15 offices

## CWA National Leadership



**LORI NOVICKIS**  
National  
CWA Leader



**KAREN GRASSO**  
CWA National  
Community Outreach  
Co-Chair



**AMY GRANT**  
CWA National  
Community Outreach  
Co-Chair



[cbiz.com/cwa](http://cbiz.com/cwa) | [cbizwomensadvantage@cbiz.com](mailto:cbizwomensadvantage@cbiz.com)

## CWA's Support of Dress for Success

- In 2020, CWA marks its **13th year** of partnering with DFS
- Monetary donations: **\$585,000+**
- Donated **more than 61,000** professional clothing items, accessories or toiletries
- 12 CBIZ women have served on boards of **10 DFS affiliates**

## Why CBIZ Women's Advantage & Dress for Success?

### CWA Goals:

- professional development, mentorship, recognition, and career enhancement opportunities for our women professionals
- help women succeed in business

### DFS Goals:

- provide network of support, professional attire and development tools to help women thrive in work and life



**DRESS FOR SUCCESS®**  
*Going Places. Going Strong.*

# Appendix E



## Human Rights Policy

## HUMAN RIGHTS POLICY

CBIZ, Inc. is committed to providing a work environment that is safe and free from unlawful discrimination and harassment in any form. We are committed to creating an inclusive culture and a supportive workplace in which our people feel comfortable coming to work and being themselves; where everyone is afforded the same opportunities to achieve their personal and professional goals; and where everyone is encouraged to develop, grow and achieve their full potential.

We are committed to respecting human rights throughout our company. We believe the protection of human rights is fundamental to conducting great business, and believe we have both the ability and responsibility to drive positive change through our culture and business practices.

It is our policy to comply with all applicable laws that provide equal employment opportunities for all persons and to prohibit unlawful discrimination.

### Human Rights Guiding Principles

CBIZ adheres to the following principles:

**Minimum Age for Employment:** we do not tolerate the use of child labor. We support our employees' rights under labor and employment laws and regulations. We prohibit the employment of anyone under the legal working age as defined by local law.

**Abuse and Harassment:** we prohibit the use of corporal punishment, sexual harassment or other forms of physical, mental, or verbal abuse.

**Discrimination:** we do not tolerate discrimination by reason of race, color, religion, national origin or ancestry, gender, gender identity, age, marital status, sexual orientation, status as a qualified individual with a disability, status as a disabled or protected veteran, union affiliation, genetic information, sex, creed, citizenship status or any other factor prohibited by law.

**Freedom of Association:** we recognize and respect the rights to freedom of association.

**Working Hours and Wages:** we ensure that working hours are reasonable and provide fair and equitable wages and other employment conditions in accordance with applicable laws. We provide employees with clear written information on their pay and conditions. We do not permit unlawful deductions from wages as a disciplinary measure. We are an equal opportunity employer and are committed to equal pay and benefits for equal work regardless of gender.

**Health and Safety:** we require working conditions in compliance with all applicable laws, including US OSHA and the laws of other jurisdictions where we conduct business, regardless of geographic location, regarding worker and occupational health and safety.

**Bribery:** we prohibit improper payments in the conduct of our business and expect full compliance with the U.S. Foreign Corrupt Practice Act and all other applicable anti-corruption laws. Limitations on permissible payments to clients or prospective clients are set out in our Associate Handbook. Employees are provided with annual training on these expectations which are reviewed and monitored by our internal audit department.

## HUMAN RIGHTS POLICY

**Recruitment of Workers:** we require labor recruitment and employment procedures to be carried out in a legal and ethical manner.

**Water and Sanitation:** we aim to understand and, where relevant, address water access risk, respecting everyone's right to safe, accessible, and affordable water.

**Forced Labor and Modern Slavery:** we will not use any forced, bonded or involuntary labor. Employees are not required to lodge deposits or identity papers and may leave in accordance with applicable law by giving reasonable notice and receiving all wages due and owing. We have a zero-tolerance for any human trafficking.

**Corporate Funds:** we will not use corporate funds for individual political campaigns.

**Code of Conduct and Ethical Expectations:** We expect our employees and contractors to exercise the highest degree of ethics in all actions they undertake on behalf of CBIZ. Employees are provided with annual training on these expectations which are reviewed and monitored by our internal audit department.

**Diversity and Inclusion:** we are committed to fostering, cultivating and preserving a culture of diversity and inclusion that welcomes, values, respects, and supports our individual differences and similarities.

### **Application, Administration and Governance**

We seek to respect human rights across our business regardless of geographic location. This Policy applies to CBIZ, Inc. and all of its subsidiaries and business partners including but not limited to employees, suppliers, vendors, contractors, and rights holders such as the following: women, children, indigenous populations, minorities, and people with disabilities. Further, we will not knowingly conduct business with partners such as suppliers, vendors, and contractors who violate this Policy.

This Policy and all statements herein – including any recommended changes or updates – are (or, as applicable, must be) approved by the CBIZ Board of Directors and CBIZ Executive Team who oversee the implementation of this Policy and are also responsible for monitoring and the overall governance compliance of this Policy.

### **Grievance and Remediation**

We are committed to addressing any adverse human rights issues we have caused or to which we have contributed, and expect our vendors and business partners to do the same.

We provide several ways for employees to raise concerns or complaints. This includes the reporting of potential misconduct to managers, Human Resources, the Legal Department and our CBIZ Employee Ethics Hotline.

The Ethics Hotline is available 24 hours a day, seven days a week. Callers may remain anonymous and any employee who reports possible or actual wrongdoing in good faith will not be retaliated against. Complaints can be reported by calling 1-866-255-2611 or by visiting [www.securityvoice.com/reports](http://www.securityvoice.com/reports). The CBIZ Internal Audit Department will provide the Audit Committee with a report of all complaints received and the results of its investigation.



## HUMAN RIGHTS POLICY

### **UN Global Compact**

With respect to labor and employment matters, we endeavor to adhere to the following principles set forth in the UN Global Compact:

PRINCIPLE 1: Businesses should support and respect the protection of internationally proclaimed human rights.

PRINCIPLE 2: Businesses should make sure that they are not complicit in human rights abuses.

PRINCIPLE 3: Businesses should uphold the freedom of association.

PRINCIPLE 4: Businesses should uphold the elimination of all forms of forced and compulsory labor.

PRINCIPLE 5: Businesses should uphold the effective abolition of child labor.

PRINCIPLE 6: Businesses should support the elimination of discrimination in respect of employment and occupation.

PRINCIPLE 7: Businesses should support a precautionary approach to environmental challenges.

PRINCIPLE 8: Businesses should undertake initiatives to promote greater environmental responsibility.

PRINCIPLE 9: Businesses should encourage the development and diffusion of environmentally friendly technologies.

PRINCIPLE 10: Businesses should work against corruption in all its forms, including extortion and bribery.

# Appendix F



## Sustainability Policy

## SUSTAINABILITY, ENVIRONMENTAL RESPONSIBILITY, AND CLIMATE CHANGE POLICY

CBIZ is a professional services firm with no manufacturing or product distribution activities. Therefore, our environmental footprint is relatively small. However, we are committed to operating our business as a responsible corporate citizen consistent with principles supporting sound environmental management and concern for the well-being of our environment. We believe an appropriate balance between environmental goals and economic health can and should be achieved. This requires CBIZ operations and employees to support and achieve the following goals:

- Operate our offices in an environmentally sound manner.
- Conserve natural resources by recycling materials, purchasing recycled materials when practical, and reducing the amount of waste produced in the operation of our business.
- Reduce our impact on global climate change by encouraging lower greenhouse gas (“GHG”) emissions in ways including less frequent business travel, the use of digital technology to reduce the use of physical resources, and the adoption of programs to reduce waste generation.
- Reduce the use of energy by employing improved energy conservation and energy efficiency practices through the use of improved technologies and digital equipment, as well as employee education.
- Use natural resources in ways that foster sustainability and quality of these resources.

CBIZ’s commitment to these goals includes the following specific elements:

- We are committed to “reduce, reuse, and recycle” programs at our offices. We will endeavor to reduce the use of, and promote recycling of, commodities such as paper, metals (e.g. aluminum) and plastic products.
- We will operate in an environmentally responsible manner and in compliance with environmental laws and regulations.
- We will make environmental responsibility and resource conservation an integral part of business management, and will support finding meaningful solutions to environmental concerns that may arise.
- We will reduce our impact on the environment through local operations’ initiatives.
- We will work to reduce the company’s carbon footprint, where possible, and to promote sustainable consumption.
- We will continue to promote our shift from print-based marketing and promotional materials to digital assets to help conserve natural resources.
- We will continue to utilize video conference meetings when practical to reduce GHG emissions and other effects of air travel.

CBIZ makes sensible and responsible environmental management an important initiative for each of our employees and our local offices. Each CBIZ office is expected to manage its activities consistent with the goals of this Policy. Each CBIZ employee is expected to work toward these goals and is encouraged to (1) advise his or her supervisor promptly of any situation that may be in conflict with this Policy, and (2) propose any reasonable solution(s) that can support this Policy and further reduce CBIZ's carbon footprint.



At CBIZ, our commitment to corporate social responsibility ties directly to our mission, vision and values. We are committed to being an employer of choice and a place where our team members are proud to work, focused on being a premier provider of exceptional advice and solutions to our clients, and being good stewards of the communities in which we live and work. We are vigilant in our efforts to understand the needs of all our constituents and to do our best to address those needs. Our core values guide our actions and decisions to be in the best interest of our people, community and environment.



[www.cbiz.com/about-us/corporate-social-responsibility](http://www.cbiz.com/about-us/corporate-social-responsibility)

