

A COMMITMENT TO OUR

People

Community

Environment



Laura Osvald, Phoenix, AZ



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

2020 National Awards



Workplace Awards 2014-2020



Please refer to page 9 for a complete listing of 2020 Workplace Awards.

A LETTER FROM OUR PRESIDENT AND CEO, JERRY GRISKO

2020 was a year that affirmed our resilience and our commitment to our clients, team members and the communities that we serve. From the impact of a global pandemic to an overdue reckoning with racial inequality, the events of the past year provided CBIZ with important opportunities to bring our mission and core values to life. Our core values form the foundation of our OneCBIZ culture and are manifested in every aspect of this, our third annual Corporate Social Responsibility report.

At CBIZ, our people matter, and this drove our efforts throughout the COVID-19 pandemic to prioritize the health and safety of our team members including a focus on mental health and wellness. 2020 also became a turning point for diversity and inclusion as we moved to accelerate these efforts towards establishing a comprehensive and long-term vision and strategy. While we are in the early stages of this journey, the learning we experienced over the last year gives us critical momentum as we seek to achieve lasting and meaningful change within CBIZ and the professional services industry.

Over the last year, our team members continued to rise to the challenge to support our clients when they needed us most. I was proud to see our team members bring that same dedication to the communities we serve at a time of urgent need. While our approach adapted, the underlying spirit of our CBIZ Cares commitment did not. Our team's overwhelming generosity fueled our first virtual fundraising campaign to support our longtime partner, Dress for Success, and enabled us to raise the monetary equivalent of more than 1 million pounds of food during our annual food drive.

This report highlights our team's incredible efforts over the last year and our commitment to our clients, our communities and each other. I am extremely proud to share these accomplishments that demonstrate what is possible when we rally together as OneCBIZ.



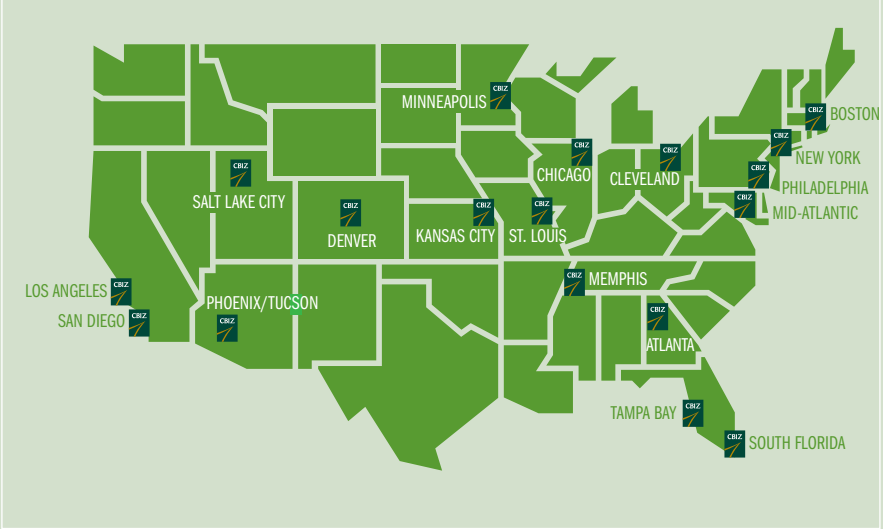
Jerome P. Grisko, Jr.
President & Chief Executive Officer
CBIZ, Inc.



Akron, OH

CBIZ FACTS AND FIGURES

MAJOR MARKETS



NYSE



REVENUE



~\$1B

TEAM MEMBERS



4,800

NATIONAL WORKPLACE AWARDS



MARKET CAP

 \$1.75B

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 OneCBIZ.

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.

A woman with blonde hair, wearing a white t-shirt and dark shorts, is climbing a rock wall. She is smiling and looking towards the camera. The wall is covered in various colored climbing holds (blue, yellow, green, black).

Juliana Alvey, Kansas City, MO

OUR COMPANY

Human Rights Policy

Please refer to **Appendix A** 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 in lieu of associates 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 [cbiz.com/corporate-governance-highlights](https://www.cbiz.com/corporate-governance-highlights) to view our Code of Professional Conduct and Ethics.



Aurion Jordan, Austin, TX

OUR COMPANY

Governance

BOARD OF DIRECTORS

Please visit cbiz.com/about-us/board-of-directors for more information on our Board of Directors.

CORPORATE GOVERNANCE

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 cbiz.com/corporate-governance-highlights.

WHISTLE BLOWER HOTLINE

The CBIZ Whistleblower 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 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 cbiz.com/terms-conditions. Our Website Privacy Policy is available at cbiz.com/privacy-policy.

Whistleblower
Hotline



1-866-255-2611

OUR PEOPLE MATTER

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

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

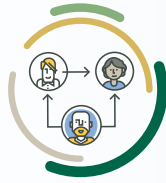
As such, the overall wellbeing of our team members is critically important to us; therefore, we advocate a wellbeing philosophy focused on five key areas: purpose, social, financial, community and physical.

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



CBIZ Kansas City

OUR PEOPLE MATTER

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.



National Workplaces

- 2020 Top Entry Level Employer
- 2020 Top Intern Employer
- Best Workplaces in Consulting and Professional Services
- 2020 Workplace Excellence Seal of Approval
- 2020 Best Places to Work in Insurance
- 2019 & 2020 Top 101 Best & Brightest Companies in the Nation



National Health and Wellness

- 2020 Health & Wellness Seal of Approval
- 2020 Healthiest 100 Workplaces in America
- 2019 & 2020 Best and Brightest in Wellness



Certifications and Rankings

- Great Place to Work Certification
- 2021 Vault Accounting 50
- 2021 Most Prestigious Accounting Firms
- 2021 Best Accounting Firms for Audit & Assurance*
- 2021 Best Accounting Firms for Forensic Accounting
- 2021 Best Accounting Firms for Tax Accounting
- Best Practices for Supporting Workers 50+
- 2021 Vault Top 100 Best Internships
- 2020 Women on Boards

**CBIZ works closely with MHM (Mayer Hoffman McCann P.C.), an independent CPA firm providing audit, review and attest services.*



Credibility

- Top 100 Retirement Plan Advisers
- Barron's 2020 Top 50 Institutional Consulting Teams



Local Health and Wellness

- Alpharetta, GA
 - Atlanta, GA
 - Brentwood, TN
 - Cleveland, OH
 - Cleveland, TN
 - Cumberland, MD
 - Kansas City, MO
 - Knoxville, TN
 - Memphis, TN
 - Minneapolis, MN
 - Murfreesboro, TN
 - New York, NY
 - Overland Park, KS
 - Philadelphia, PA
 - Phoenix, AZ
 - Plymouth Meeting, PA
 - Providence, RI
 - South Florida
 - Woodstock, GA
- Some offices were jointly recognized in their region.*



Local Office Workplaces

- | | | | | |
|-----------------|------------------|-------------------|----------------------|----------------|
| Akron, OH* | Chicago, IL* | Los Angeles, CA | Philadelphia, PA | San Jose, CA |
| Alpharetta, GA | Cleveland, OH* | Memphis, TN | Phoenix, AZ* | Tampa Bay, FL* |
| Atlanta, GA | Delray Beach, FL | Naperville, IL* | Plymouth Meeting, PA | Tucson, AZ* |
| Boca Raton, FL* | Denver, CO | Network Solutions | Providence, RI* | Uniontown, OH* |
| Boston, MA | Encino, CA | New York, NY* | San Diego, CA* | Woodstock, GA |
| Brentwood, TN | High Point, NC* | Oxnard, CA | San Francisco, CA | |

**Indicates multi-award winner*

OUR PEOPLE MATTER

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 that allow our team members to further develop their talents and abilities.

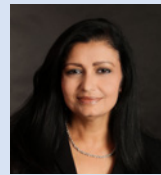


For detailed information about content and types of training, please refer to **Appendix B** for our Enterprise-Wide Training Brochure.

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.




The recipient receives recognition on our intranet, a trophy for their office, and has their name engraved on the permanent trophy in our corporate office in Cleveland. Our 2020 Award recipient was Deepa Menon, Managing Director, CBIZ Valuation Group, Dallas.

Volunteers from our Raleigh, NC office spent an afternoon helping out at the Inter-Faith Food Shuttle Farm.



When the COVID-19 pandemic hit, we immediately took action to adjust to the unprecedented new environment. The following are some of the key arrangements made to help our team through these challenging times:

- Formed a COVID-19 Crisis Response Team
- Swiftly and successfully transitioned 95%+ team members to remote work
- Suspended business travel and work at client sites
- Kept offices open for essential operations
- Launched a comprehensive communication strategy that included:
 - Initial pandemic alert
 - Weekly CEO videos and daily e-mail updates detailing ongoing company response, strategy and prevention measures
 - Updated office and travel policies
- Launched internal COVID-19 Resource Center to address:
 - Working and leading remotely
 - Wellbeing
 - Technology
 - Business development
 - Social forums
- Updated workplace policies and/or programs:
 - Employee-favorable changes to medical spending accounts and 401(k) policies
 - Flexible work arrangements to keep team members working safely from home
 - Temporary COVID pay for those unable to work
- Launched remote workplace programs to address team member engagement, volunteerism and Green Team initiatives

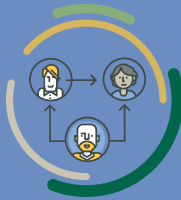
A photograph of Olivia Lehl, a woman with long blonde hair, smiling while sitting on a light-colored sofa. She is wearing a grey sweatshirt and is positioned in front of a desk with a computer monitor and keyboard. The sofa is decorated with several pillows, including a purple one and one with a colorful circular pattern. A small table next to the sofa holds a water bottle and other items. The background shows a window with blinds.

Olivia Lehl, Boca Raton, FL

OUR PEOPLE MATTER

Social

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



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.

Since the program's inception in 2016, more than **2,500** team members have chosen their own gifts from an online catalog.

Individual External Recognition

We are 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 C** for a listing of our professionals who were recognized in 2020.

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 in 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

With 2020 being a challenging year for engagement, we created our “Remote Team Member Engagement Guide.” Full of ideas to virtually stay connected and retain local culture, this guide was updated periodically as local offices shared their successful events.



Karen Stafford and Andrea Crump of CBIZ in Richmond, VA volunteered at CARITAS, an organization dedicated to helping the homeless and those facing the challenges of addiction.

Diversity and Inclusion

At CBIZ, we believe Diversity and Inclusion is a business imperative and we are working together toward making it an essential and valued part of our OneCBIZ culture. We strive to create an environment that welcomes, values, respects, leverages and develops our individual differences and similarities and this commitment includes identifying and actively combating racism and discrimination in any form.

In 2020, CBIZ renewed our commitment to improving diversity and inclusion across the company and in the industries and communities where we work. We are in the process of accelerating our efforts with a focus on actionable, short-term steps to engage our team members and build momentum. View our most recent statement on these efforts by visiting **Appendix H**.

CEO Jerry Grisko established the CBIZ Diversity and Inclusion Task Force, a nimble group of leaders from across the company tasked with accelerating this effort, engaging our team members and identifying experts to assist in the development of the overall strategy. The Diversity and Inclusion Task Force reports directly to the CEO and provides regular updates to the Board of Directors and CBIZ team. In addition to the Task Force, an internal D&I Champions group has been established made up of over 150 self-selected CBIZ team members from across the company who volunteered to support these efforts in a variety of ways.

This past summer, the Diversity and Inclusion Task Force completed two surveys, one with the D&I Champions group and one with the entire CBIZ team, to gather input, ideas and feedback to shape short-term priorities and inform the development of the long-term, comprehensive strategy. In addition to identifying the need for an external advisor to support these efforts, the surveys identified four short-term priorities:

- Establishing a **dedicated diversity and inclusion resource site** featured on the CBIZ intranet. This site, which features curated content on a variety of diversity and inclusion topics and issues, was launched in February 2021. The site also serves as a clearinghouse for ongoing organizational updates, upcoming events and opportunities for engagement.

(continued on next page)



- **Building our D&I network** including the cultivation of partnerships with diverse professional organizations and associations to support recruitment, retention, engagement and business development efforts. The work group established for this priority is compiling an inventory of existing relationships at the office and individual team member level to guide this effort.
- **Establishing and expanding recruitment partnerships** with schools and institutions that attract a diverse student body to expand our pool of applicants for interns and entry-level positions while increasing brand awareness and recognition. The work group is partnering with CBIZ's National Recruitment Team on this effort.
- **Building awareness through CBIZ-wide events.** In February 2021, CBIZ launched the *Our People Matter Speakers Series* aligned to our core values. This series seeks to increase awareness of the importance of diversity and inclusion through exposure to external speakers on a variety of topics. The first series event featured a nationally recognized author in honor of Black History Month.

These short-term actions combined with CBIZ's existing efforts and assets will form the foundation of a more comprehensive and long-term diversity and inclusion strategy. CBIZ is in the process of launching an inclusive strategy development process with support from an external consultant. This process will be completed in 2021 and will result in a three-to-five-year action plan focused on measurable progress for our defined priorities.

In September 2020, CBIZ joined CEO Action for Diversity and Inclusion, the largest CEO-driven business commitment to advance diversity and inclusion within the workplace. Jerry Grisko signed onto the CEO Action Pledge and joined leaders from more than 1,000 of the world's most well recognized companies and organizations representing over 85 industries. In taking the pledge, we at CBIZ are committing to four key actions that will not only support our own Diversity and Inclusion related efforts, but also help to foster collaboration within our industry and with other like-minded companies. These four actions are:

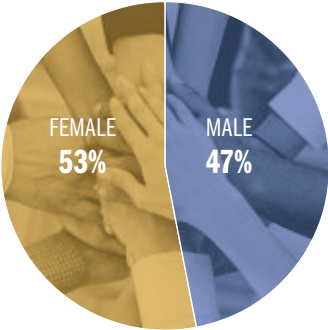
- Cultivating a workplace that supports open dialogue on complex, and sometimes difficult, conversations about diversity and inclusion
- Implementing unconscious bias training and education
- Sharing what's working and what's not with our peer companies inside and outside of our industries in order to capture lessons learned and promising practices
- Engaging our Board of Directors in the development and evaluation of our comprehensive Diversity & Inclusion strategy and action plans

The acceleration of these efforts builds on numerous existing initiatives that impact our team and business. The following information further describes our policies and efforts already underway.

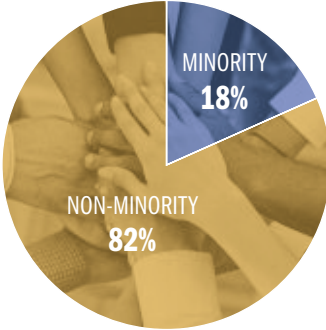
Diversity

Metrics

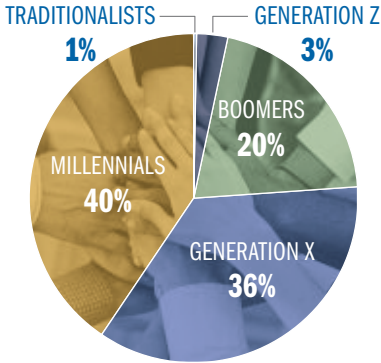
PERCENTAGE OF TEAM MEMBERS BY GENDER



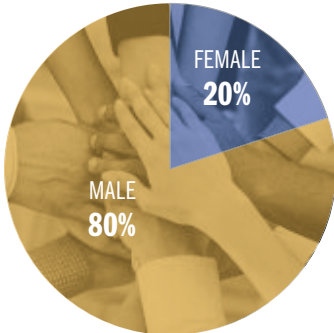
PERCENTAGE OF TEAM MEMBERS BY ETHNICITY



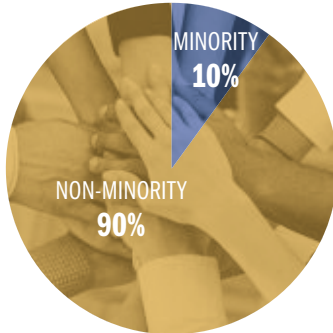
PERCENTAGE OF TEAM MEMBERS BY GENERATION



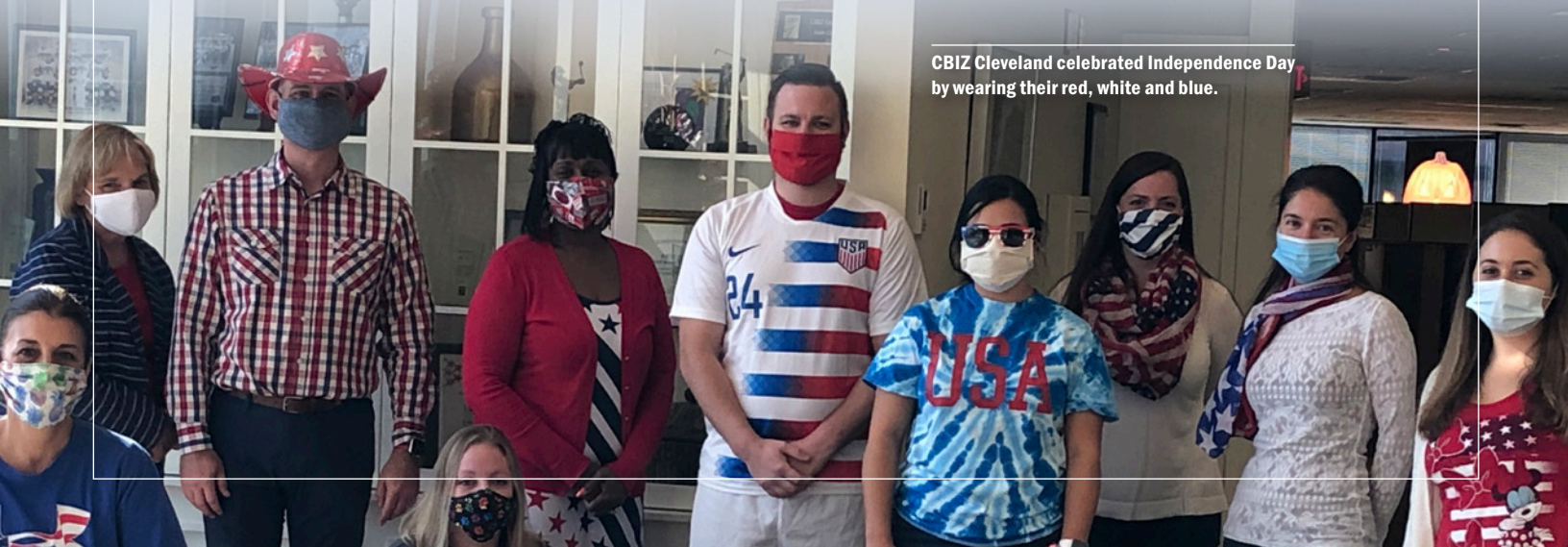
PERCENTAGE OF BOARD OF DIRECTORS BY GENDER



PERCENTAGE OF BOARD OF DIRECTORS BY ETHNICITY



CBIZ Cleveland celebrated Independence Day by wearing their red, white and blue.



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 cbiz.com/cwa for more information on CBIZ Women's Advantage.

CBIZ Young Professionals

Mission

The purpose of CBIZ Young Professionals (CYP) is to provide exceptional growth and development opportunities to our young team members to help them achieve their personal and professional goals.

Vision

Our vision is to enhance our organization and our community by inspiring young professionals to join forces, cheer each other on and make work worth it.

Participation

All CBIZ team members are welcome to participate in CYP. References are sometimes made to those who are "young at heart" to ensure inclusivity. The name CBIZ Young Professionals was chosen to differentiate the program from other leadership and training

programs within CBIZ. The program aims to give all team members the opportunity to communicate openly across business lines, positively represent CBIZ in the community, connect with new people and increase understanding of CBIZ and its services.

The program has been piloted in select cities and is now being nationalized.

Training, Learning & Development

Diversity and Inclusion focused training and education is required for all team members on an ongoing basis. CBIZ recently launched a new, three-part training series that includes an overview of the business case for Diversity and Inclusion, why Diversity and Inclusion is a business imperative for CBIZ and understanding and mitigating unconscious bias.

Other examples of required courses include:

- "Succeeding in a Diverse Environment" is designed to raise awareness and sensitize our team members to the opportunities and challenges inherent in our changing workforce and professional world.
- "CBIZ Code of Ethics" focuses on the role and responsibilities of the individual sustaining an ethical business culture.
- "Anti-Harassment Training: Creating a Respectful Workplace" is designed to raise awareness on what harassment is, how to prevent harassment and the role and responsibility of each team member to contribute to a work environment grounded in mutual respect.
- "Succeeding Amidst Generational Differences" explores our multi-generational workforce and offers strategies to improve teamwork and collaboration through communication and a better understanding of generational experiences and preferences. A companion supervisory component "Managing Generational Differences" is designed to support leaders in motivating, communicating with and coaching team members of various generations.

Engagement

Our team members' voices are important to us. Our company-wide employee engagement surveys help us gauge how we fare as an employer. The ideas expressed in these 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



Team members from CBIZ Kansas City volunteered to help clean up a local park.

OUR PEOPLE MATTER

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 organizational 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 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



Bruce Walsh, Plymouth Meeting, PA

OUR PEOPLE MATTER



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 a 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 D** for an overview of these items.

20:04 Team members from our Oxnard office played a fun virtual game of Taboo.



OUR PEOPLE MATTER

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.



Kudos to **Meghan Johnson** of our Kansas City office! She took advantage of our wellness programs to adopt a healthier lifestyle and lose weight. See her story at: <http://bit.ly/3aek90z>



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 D** 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 team members and their dependents to help manage challenges at home and in the workplace.



Valjean LeCount
Woodstock, GA

OUR COMMUNITY

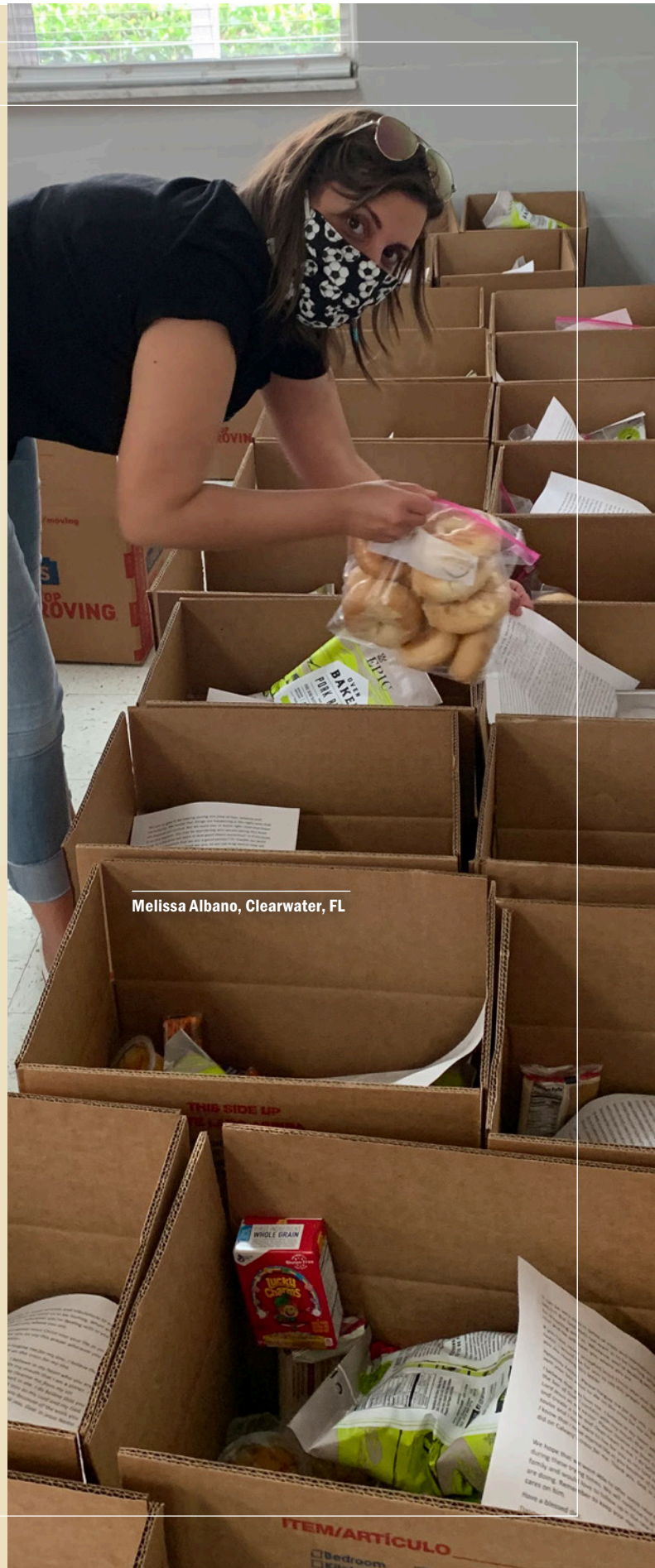
We pride ourselves on being a diverse organization that builds long-lasting relationships with and provides support for the communities in which we live and work, as well as national organizations. To fulfill this commitment, we launched our CBIZ Cares Program to encourage participation in volunteering,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



Volunteering

In honor of our 20th anniversary in 2016, 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!

Being mindful of our team members' safety during the COVID-19 pandemic, we took a different approach to our 2020 CBIZ Cares program. In lieu of our usual team volunteering, we encouraged everyone to volunteer individually or in small groups as long as safety measures were implemented.



Melissa Albano, Clearwater, FL

OUR COMMUNITY

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.

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.



Due to the COVID-19 pandemic in 2020, we held a virtual campaign through a national online platform. Our team members generously made monetary donations equivalent to more than 1 million pounds of food.

POUNDS OF FOOD COLLECTED

2020	1,005,159 pounds
2019	1,072,252 pounds
2018	1,021,586 pounds
2017	1,140,960 pounds
2016	1,051,864 pounds
2015	1,026,140 pounds
2014	747,743 pounds
2013	650,776 pounds
2012	648,034 pounds
2011	576,289 pounds
2010	462,099 pounds
2009	403,146 pounds

*More than 9 million pounds
of food across the country*

Volunteers from our Austin, TX office helped out at the Central Texas Food Bank.

OUR COMMUNITY



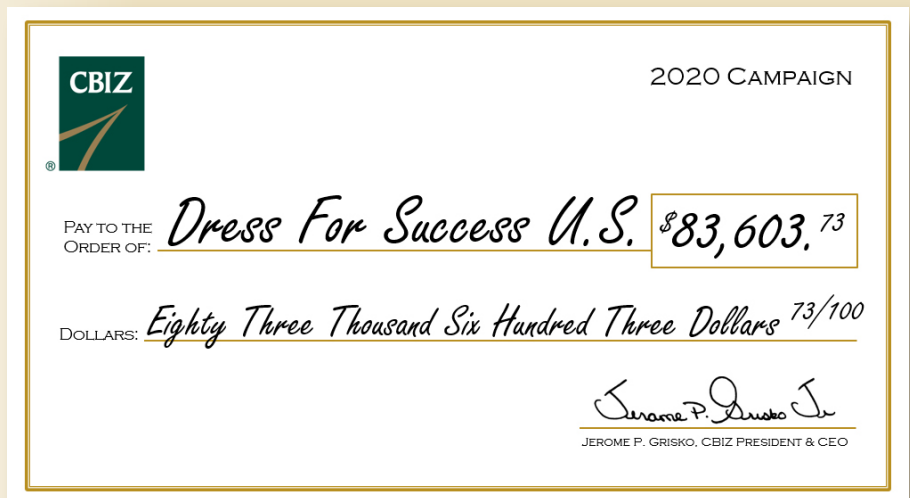
CBIZ Women's Advantage & Dress for Success

Through our CBIZ Women's Advantage Program, we sponsor an annual campaign to benefit Dress for Success (DFS). DFS is an international nonprofit 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.

During 2020, we had to pivot to a virtual campaign and it was our most successful to date with more than \$83,000 donated to 45 DFS affiliates nationwide.

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

Through our 2020 virtual fundraising campaign, **we donated more than \$83,000** 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 team members care about working in a great place that values:

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



The remote environment in 2020 greatly reduced our paper usage.

Through a sampling of our offices, we discovered that **this reduction saved**

approximately 34 trees and **\$2,300** per office!

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.

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.

(continued on page 27)

HUMAN RIGHTS POLICY

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.

The CBIZ Internal Audit Department will provide the Audit Committee with a report of all complaints received and the results of its investigation.

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.

Enterprise-Wide Training Brochure

CBIZ

Enterprise-Wide Training



®

Accounting | Insurance | Advisory



CBIZ Enterprise-Wide Training

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 7-8 Benefits & Insurance
 8-9 CBIZ Women's Advantage
 9 Additional Training Programs

HR: Learning & 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.



Diversity & Inclusion (D&I)

D&I education is required for all CBIZ team members on an ongoing basis. This includes completing a three-part series designed by CBIZ that includes why D&I is a business imperative for CBIZ, understanding unconscious bias and its impact on our workplace, and strategies to overcome differences and adopt inclusive behaviors. A variety of books, films and other resources are featured on a dedicated D&I portal on CBIZ Central.

Enrichment Series

The Enrichment Series is a collection of programs designed to support and enhance the personal and professional growth of our associates. The following courses are CBIZ-developed and led by CBIZ HR Business Partners:

Supervisory Skills

- Behavioral Interviewing Skills
- Effective Performance Management Systems
- Effectively Conducting the Disciplinary Process
- Emotional Intelligence
- Managing Generational Differences

Leadership

The following is a sample of over 70 courses available as classroom or self-paced e-learning modules in the MyLearn library.

- Managing and Leading Others
- Problem Solving and Critical Thinking
- Time and Project Management
- Communication

Customer Service

Miller Heiman Group-authored courses 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.

Personal Work Skills

There are numerous CBIZ-developed courses led by our HR Business Partners designed to assist team members 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
- In addition, team members may search the MyLearn library for self-paced e-learning courses by entering a competency or topic to see what is available.

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. MyLearn includes a direct link to MyCPE, our system which houses Continuing Professional Education (CPE) credits for our Financial Services associates.

Presentation Skills Workshop

In this 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 presentations and receive constructive feedback from the facilitator.

State-Specific Harassment Prevention Training

A growing number of states in the U.S. require specific training in addition to CBIZ-required training for harassment prevention. Our Corporate HR Learning & Development team oversees this training and assigns as applicable to ensure compliance.

Financial Services: Learning & Professional Development Programs*

Core National-Level Technical Learning

These 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 intended for Associates with two years or less of experience. The Senior Associate Conference includes 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 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.*

Tax Manager Symposium

This technical conference is intended for all tax Managers and Senior Managers. The program covers advanced technical topics that impact our clients in various areas of taxation. Attendees will build knowledge and consultative skills that will enable them to add value to our clients. In lieu of the Symposium, tax Managers and Senior Managers may be invited to the tax portion of the CBIZ & MHM Biennial Conference (discussed on next page).

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 are nationally developed, locally delivered programs designed to supplement Core National-Level Technical Training by providing a platform for Associates' and Senior Associates' growth as professionals and leaders.

- The Associate Professional Development program offers Associates a smooth transition from school to the professional world, focusing on issues such as time management, receiving feedback and preparing for busy season.
- The Senior Professional Development program assists Senior Associates in developing strong client, internal and external relationships, focusing on issues such as delegation, giving feedback and goal setting.





Accelerate

Accelerate is a blended learning program that helps Associates through Senior Managers develop consultative and business development skills. The program focuses on 12 core skills understood to be characteristic of successful consultants and business developers, presented in a context appropriate for their level. Accelerate features multiple points of contact, utilizing a unique blend of self-paced, social and experiential learning.

Manager Professional Development

New Manager Orientation

This program 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

These workshops are intended to help experienced Managers and Senior Managers further build the behavioral skills necessary to succeed in that role. Each workshop focuses on one core skill and vary from year to year. Previous workshop topics have included presentation skills, delegation for employee growth, and productive conflict and crucial conversations. All experienced Managers and Senior Managers are generally expected to attend at least one workshop per year.

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 event is 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.

Career Advisor Program

This program fosters employee growth by facilitating learning and development opportunities, coaching and feedback. External client-facing staff are typically assigned a Career Advisor within six months of employment. Advisors and advisees meet regularly to set performance and development goals, discuss progress toward those goals and maximize the value of formal and informal learning and development opportunities.

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.

The logo for CBIZ, featuring the letters "CBIZ" in white on a dark green square background. Below the text is a stylized graphic of two curved lines, one blue and one green, suggesting upward movement or growth.

Benefits & Insurance: Organization & Talent Development

Leadership Development

The leadership development courses are offered across the country both in person and virtually 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 course covers 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, as well as an introduction to both change and conflict resolution.

Additional development opportunities include:

- Presenting Virtually
- Building a High Performing Team
- Coaching-the-Coach Certification
- Training-the-Trainer Certification

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 leaders across the division to strengthen effectiveness and provide additional growth opportunities. Approval is required.

Customized teambuilding is provided to teams who seek to improve, grow and strengthen.



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.

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



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

QuickHelp

Select "QuickHelp" under Applications on CBIZ Central to access your personal BrainStorm QuickHelp portal for learning about Microsoft Office 365. Features include video content, assessments, live events and more. And, you can earn badges and compete with other team members for a place on the leaderboard!

United Training

CBIZ partners with United Training to provide a national discount to a variety of end-user application and technical training. Details are available at CBIZ Central > My Resources > Employee Materials > Training & Professional Development.

HCM: CBIZ HR Information System

HCM is our Human Resources information platform. Training about HCM, as well as goal setting, performance documents and other user guides are available on the Training & Professional Development page on CBIZ Central.

CBIZ Channel

The CBIZ Channel, located on CBIZ Central > Information Technology > Training, provides access to a wide array of resources in video format. These include training on software tools, webinar recordings, event activities, messages from our CEO and more.

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
- Setting Up Your Digital Email Signature



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.*

Recognized Professionals

CBIZ Celebrates Our Recognized Professionals

CBIZ is proud to recognize our team members for their commitment and dedication to their clients, professions, communities and diversity. We are proud to honor our remarkable professionals who are recipients of select 2020 awards and thank them for helping to make CBIZ a success.



Carol Alvarez
Notable Women in Accounting
Crain's New York Business



Brooke Balducci
40 Under 40
Memphis Business Journal



Lindsey Benson
20 Young Business Leaders to Watch in 2020
AZ Big Media



Celeste Brown
Superior Travelers Agent Recognition Award
Travelers Personal Insurance VA



Cheryl Cadle
Women to Watch
Massachusetts Society of Public Accountants (MSCPA)



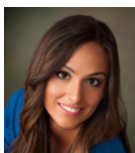
Cheryl Calhoun
- Most Influential Minority CPAs
- Women of Influence: Accounting
Los Angeles Business Journal



Tarra Curran
Women to Watch
Massachusetts Society of Public Accountants (MSCPA)



Jacqueline Dale
- Business Women of the Year, Finalist
- 40 Next Top Business Leaders Under 40
San Diego Business Journal



Stefania DeMarco
PICPA's Young Leader Award
Pennsylvania Institute of Certified Public Accountants (PICPA)



Eva Gregory
Young Direct Marketer of the Year
Kansas City Direct Marketing Association (KCDMA)



Mary Kay Griffin
Alumni Service Award
Dave Eccles School of Business Hall of Fame



Moira House
The Patriot Award
Tennessee National Guard Employer Support of the Guard and Reserve (ESGR) Committee



Allison Hutz
PICPA's Young Leader Award
Pennsylvania Institute of Certified Public Accountants (PICPA)



Alex Lanning
Women in Insurance Leadership: NEXT
Digital Insurance



Sookyung Lee
Notable Women in Accounting
Crain's New York Business



Michael Lewis
Alberto Romero Award
Tampa Bay Collaborative Law



Deepa Menon
Steven L. Gerard Legacy Award
CBIZ



Eric Munninghoff
Business Journal Next Generation
KC Business Journal



Kelly O'Neil
- Leaders of Influence: Private Equity Investors & Advisors
- Women of Influence: Accounting
Los Angeles Business Journal



Kimberly Oros
2020 Top Women Advisors, "Captains" Category
National Association of Plan Advisors



Cindy Orr
2020 Top Women Advisors, "Captains" Category
National Association of Plan Advisors



James Parks
500 Most Influential People in Los Angeles - Professional Services
Los Angeles Business Journal



Jing Shen
Thriving in their 40s
Los Angeles Business Journal



Kris St. Martin
- Inaugural CWA Champion for 2020
CBIZ Women's Advantage
- Inaugural "Champions Award"
Bank on Women



Polly Thomas
250 Most Powerful Business Leaders in KC
Ingrams



Scott Wragg
2020 Leaders and Achievers
Providence Business News



cbiz.com

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

82,000+ CLIENTS



OUR SERVICES



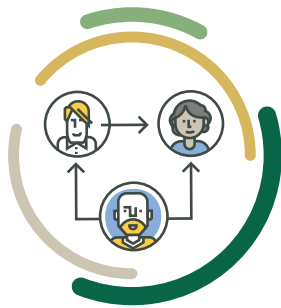
FIND YOUR PERFECT FIT

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.

CWA DFS Infographic

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

About CBIZ Women's Advantage

- Established in **2007**
- **20 CWA board members** from across all business lines in 15 offices

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We are so appreciative of our relationship with CBIZ Women's Advantage. With CBIZ's ongoing support over the last 13 years, our affiliates are extremely thankful to CBIZ employees for their generosity, enthusiasm, and support.

–JOI GORDON, CEO OF DRESS FOR SUCCESS WORLDWIDE



DRESS FOR SUCCESS®
Going Places. Going Strong.

”

CWA National Leadership



LORI NOVICKIS
National
CWA Leader



KAREN GRASSO
CWA National
Community Outreach
Co-Chair



AMY GRANT
CWA National
Community Outreach
Co-Chair



**Women's
Advantage**

cbiz.com/cwa

cbizwomensadvantage@cbiz.com

CWA's Support of Dress for Success

- In 2021, CWA marks its **14th year** of partnering with DFS
- Monetary donations: **\$670,000+**
- 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

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.
- 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’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.

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.

SASB Disclosures

SASB DISCLOSURES

The Sustainability Accounting Standards Board (SASB) has established disclosure standards, by industry, relating to sustainability matters. We have considered SASB's Professional & Commercial Services industry standards in providing the disclosures below.

Data Security

Data security is a top priority for CBIZ. As such, we strive to maintain appropriate data security standards and effective emergency and crisis management.

Our Chief Information Officer oversees an IT Security & Compliance Department dedicated to information security and enforcement of our Information Security Management and Administration Policy. Our policy applies to all employees, contractors and consultants, and all company sites and subsidiaries. The policy outlines our controls over data classification, privacy, protection and retention, including disaster recovery incident response, data breach incident response and security incident response procedures. We use threat and vulnerability management including routine testing to identify opportunities for improvement. We also provide data security training for all team members in addition to regular communications to reinforce data security awareness and vigilance.

The collection, usage and retention of client information required to provide our services is done according to applicable federal and state privacy, data protection and cyber security standards. CBIZ is subject to various state and federal regulations including, but not limited to, Sarbanes Oxley (SOX), Health Insurance Portability and Accountability Act (HIPAA) and the Health Information Technology for Economic Clinical Health (HITECH) Act. For additional information on how we collect, use and retain customer information, please refer to our **Privacy Policy** on **page 7**.

For additional information refer to the risk factors listed in Company's most recent annual and quarterly reports on Form 10-K and Form 10-Q filed with the Securities and Exchange Commission.

Workforce Diversity

Below are percentages for workforce diversity among our team members and board of directors for 2020. For more information on our diversity and inclusion efforts, please refer to **page 14** of this report.

Workforce by Gender & Race/Ethnicity	
Male	47%
Female	53%
Non-minority	82%
Minority	18%

Workforce by Generation	
Gen Z	3%
Millennials	40%
Gen X	36%
Baby Boomer	20%
Traditionalist	1%

Workforce Turnover	
Total	16%

Board of Directors	
Male	80%
Female	20%
Non-minority	90%
Minority	10%

(continued on page 49)

Workforce Engagement

Our team members' feedback shapes our efforts to strengthen our OneCBIZ culture. During 2020, we intensified our engagement efforts as we supported our team through the COVID-19 pandemic. In 2021, we will launch a refined workforce engagement survey.

During 2020, CBIZ was certified as a *Great Place to Work*, and received 68 national and local workplace and health and wellness recognitions including **Best Workplaces in Consulting & Professional Services** by *Great Place to Work*. For more information on workplace awards and recognitions, see **page 9**.

Professional Integrity

The success of CBIZ is directly tied to our reputation for integrity in the marketplace. We earn customer, team member, vendor, and investor loyalty and trust because we are honest, dependable, reliable and responsible. We aspire 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. The CBIZ Code of Professional Conduct and Ethics outlines the ethical standards and behaviors we require for our team members. These standards include a team member's obligation to transact business fairly and honestly; to promote the Company's best interests without regard to personal interests; to safeguard all Company property and information and treat others' property and information with the same respect; to enhance the quality of life in the communities we serve; to treat people with dignity and care; and to comply with the law.

CBIZ has an Employee Ethics Hotline in place that is available 24 hours a day, seven days a week and employees are encouraged to anonymously report possible or actual wrongdoing or violations without fear of retaliation.

For more information on our approach to ensuring professional integrity, refer to the Ethics and Governance sections on **pages 6 & 7**, as well as the corresponding link to our **Code of Professional Conduct and Ethics** on our website.

Statement on Diversity and Inclusion

STATEMENT ON DIVERSITY AND INCLUSION

To Our Stakeholders, Team Members and Communities:

At CBIZ, we condemn racism and discrimination in any form and recognize our responsibility to actively combat it in our work place and our communities. I remain deeply troubled by the senseless killing of George Floyd and similar events that have led to protests over the last several weeks. Mr. Floyd's death is but another example of injustices that continue to fall disproportionately on Black people and Black communities. We stand with our Black team members during this painful time but recognize that empathy is not enough.

It is central to CBIZ's core values to 'do the right thing' and that we use this moment to renew the urgency around our diversity and inclusion efforts within both our team and our industry. Our words must translate to tangible action if we want to achieve the lasting and comprehensive change we seek. It is with this goal in mind that we established an internal CBIZ Task Force to focus on accelerating our diversity and inclusion work in the short-term as the foundation for our long-term strategy. I am incredibly proud of the number of CBIZ team members from across our company who immediately offered their time, energy and expertise to support this important work.

Our commitment to drive change also means partnering with others to increase diversity and inclusion in the professional services industry. We look forward to working collaboratively with our peer firms as well as associations and organizations dedicated to supporting minority professionals on these efforts.

These immediate actions will enable us to commence what we know is a long-term journey to institutionalize diversity as an essential and valued element of our culture. Working together, we will continue to listen and learn as we develop the path forward for CBIZ.



Jerome P. Grisko, Jr.
President & Chief Executive Officer
CBIZ, Inc.

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.

cbiz.com/about-us/corporate-social-responsibility

