



CORPORATE
Social Responsibility



A Commitment to Our

PEOPLE | COMMUNITY | ENVIRONMENT

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At CBIZ, our commitment to corporate social responsibility ties directly to our mission, vision, and values. Our core values guide our actions and decisions to be in the best interests of our people, community, and environment. We are proud to be our team members' employer of choice while providing an exceptional experience for the clients we serve and engaging with the communities where we live and work.

A Letter from Our CEO

THE POWER OF MANY COMING TOGETHER AS ONE TO ACCELERATE GROWTH

Early in 2023, we capped off a record year of growth by launching a new logo that combines elements from our history with a bold eye to the future. The CBIZ vector has always been fundamental to our identity and symbolizes the **power of many coming together as one to accelerate growth**. Central to the idea of coming together is our commitment to our CBIZ team, now over 6,500 members strong, and the communities where we live, work, and serve.



The success we achieved in 2022 is a reminder of what is possible when we rally around a common vision and shared goals, including our commitment

to be accountable to all our stakeholders and our communities through our corporate citizenship efforts. The results of those efforts were evident through the 84 workplace awards that CBIZ received in 2022. These awards are based on candid feedback from our team members which we use to strengthen our culture and enhance employee experience.

Our efforts to advance diversity and inclusion focused on our employee resources groups (ERGs) this year as we built on the success of CBIZ Women's Advantage (CWA) and CBIZ Young Professionals (CYP) and launched two new ERGs: BIPOC (Black, Indigenous, and People of Color) and CBIZ Pride, serving our LGBTQ+ populations. With our goal of creating a sense of belonging for all our team members, we encourage our leaders and teams to engage in open dialogue about diversity and inclusion through our 'Days of Understanding' initiative, part of our work as a signatory to the CEO Action for Diversity and Inclusion pledge.

Just like the CBIZ vector has been a fundamental part of our identity from the beginning, so has our

commitment to give back to our communities. CBIZ Cares, our companywide community engagement initiative, had another successful year with an increase in volunteer hours, charitable donations, and nonprofit board service. Our CBIZ Women's Advantage ERG led the way with a record-setting campaign to support Dress for Success, our longtime partner. Once again, our annual food drive surpassed our goal of donating one million pounds to benefit food banks across the country. Our CBIZ team also rallied to respond to the war in Ukraine by raising funds for refugee relief through the International Red Cross and UNICEF.

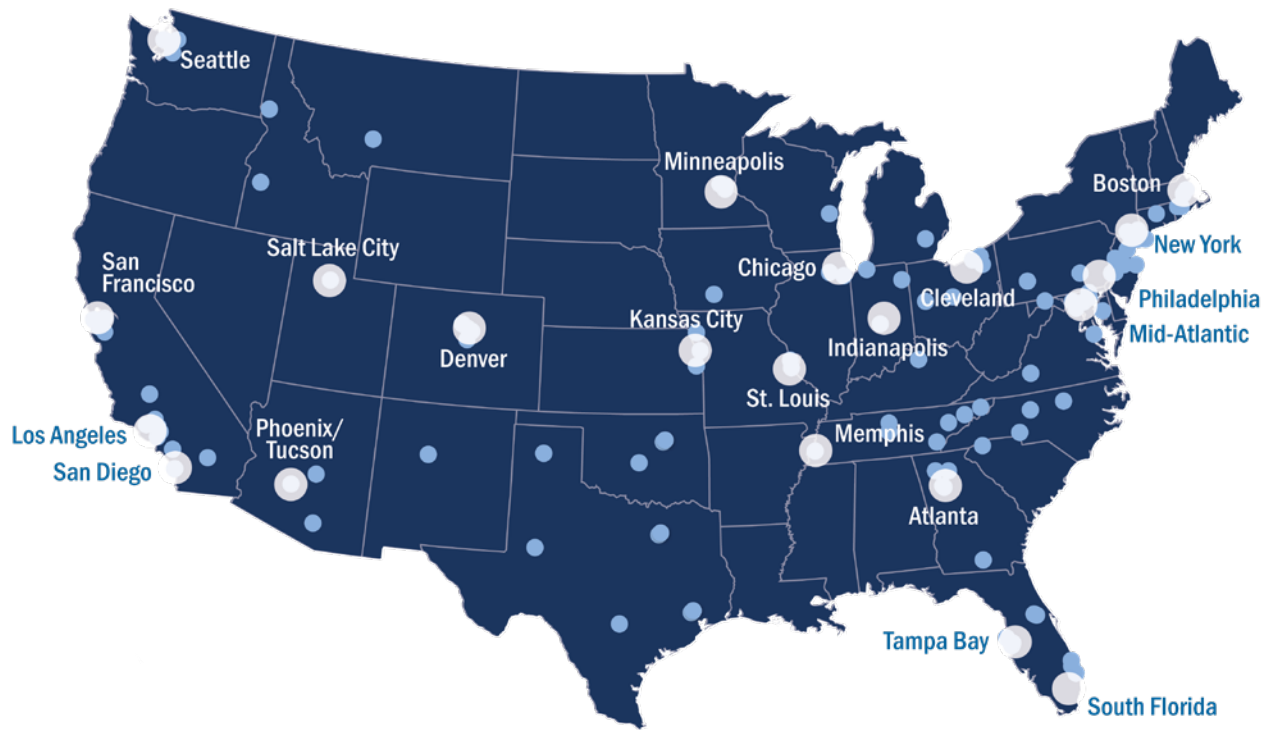
Finally, as we plan for the future of our workplaces, we have unlocked opportunities to protect our environment and increase sustainability while also providing workspaces that support the ways our teams work and collaborate. Areas of focus include efforts to embed green practices in our operations including expanded recycling and resource conservation.

2022 marks the fifth year we have published our Corporate Social Responsibility report. Reflecting on the last five years, I am proud of the incredible growth we have achieved for both our business and our efforts to positively impact our people, communities, and environment. We look forward to building on this momentum in the coming years and experiencing what is possible when we **come together as one to accelerate growth**.

A handwritten signature in blue ink that reads "Jerome P. Grisko, Jr.".

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

CBIZ Snapshot



REVENUE

\$1.4B+



21

MAJOR MARKETS



120+

OFFICES

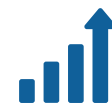
MARKET CAP

~\$2.5B+



84

WORKPLACE AWARDS



CBZ

NYSE

TEAM MEMBERS

6,500+

Our Company

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.



CBIZ Bellevue, WA participated in the annual volunteer day, helping a local charity create pantry packs for families in need.

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.

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 email 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 Company

Board of Directors

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



Rick L. Burdick, Chairman



Michael H. DeGroot



Joseph S. DiMartino



Gina D. France



Jerome P. Grisko, Jr.



Sherrill W. Hudson



Richard T. Marabito



A. Haag Sherman



Todd J. Slotkin



Benaree Pratt Wiley



Rodney A. Young

Our Company

Corporate Governance

As a publicly traded company, (NYSE: CBZ) 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 how we strive 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.

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.

Please refer to [Appendix A](#) for a complete copy of our Human Rights Policy.



CBIZ Marks Paneth volunteers with Partnerships for Parks.



CBIZ Salt Lake City volunteered at Sage Mountain Animal Sanctuary.

Our Company

Professional Conduct & 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.

We act with integrity by incorporating the values of honesty, fairness, respect, loyalty and cooperation into all of 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 for our personal interests.
- We safeguard all of 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.



CBIZ ARC Consulting team made cards for children in need.

To guide team members to make the best possible decisions, CBIZ has created a Code of Professional Conduct and Ethics Guide. While not intended as a detailed manual for resolving every question or conflict, the Code of Professional Conduct and Ethics Guide has been designed to provide 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.

In addition, all newly hired employees are required to complete a two-part ethics course within their first 10 days of employment, with refresher courses assigned every few years.

Please visit cbiz.com/corporate-governance-highlights to view our Code of Professional Conduct and Ethics.

WHISTLEBLOWER 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 provides the Audit Committee with a report of all complaints 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

Value Proposition

At CBIZ, our value proposition to our clients is the breadth of our services and the depth of our expertise, including our unique ability to provide multi-disciplinary, coordinated solutions that respond to the complexity and uncertainty of today's business environment. CBIZ brings value because of the talent, expertise and commitment of the more than 6,500 team members who make up our national team.

"Our People Matter" is one of our five core values and is evident in our efforts to be our team members' employer of choice.



Our Pledge

1

Commit to the personal and professional growth of our team members

2

Respect individuality and diversity and extended dignity to all

3

Value and recognize hard work, efforts and contributions of our team members

4

Support the communities in which our team members live and work

5

Understand the balance among our personal, community and professional lives



Our People

84

WORKPLACE AWARDS IN 2022



National Workplaces

- 2022 Top Workplaces USA
- 2022 Best and Brightest Companies in the Nation
- 2022 America's Best Midsize Employers – Forbes
- 2022 Top Workplaces – Culture Excellence in Compensation and Benefits, Innovation, Leadership, Purpose and Values, Life Flexibility, Professional Development, Employee Appreciation
- 2022 Best Workplaces for Millennials
- 2022 Best Places to Work in Insurance
- 2022 Early Talent Award

Certifications & Ranking

- 2022 Great Place to Work Certification
- 2022 Best Accounting Firms - Forbes
- 2022 Best Tax Firms - Forbes
- 2022 Top 100 Brokers – Business Insurance
- 2022 Top 500 Entry Level Employer
- 2022 Top 100 Intern Employer
- 2022 Top 100 Firms – Accounting Today
- 2023 Vault Accounting 25
- 2023 Vault Accounting Most Prestigious
- 2023 Vault Best Accounting Firms for Accounting
- 2023 Vault Best Accounting Firms for Audit/Assurance**
- 2023 Vault Best Accounting Firms for Forensic
- 2023 Vault Best Accounting Firms for Tax

Local Office Workplaces

- | | | |
|--------------------------|-------------------------|-----------------------|
| ■ Akron, OH* | ■ Irvine, CA | ■ Providence, RI* |
| ■ Alpharetta, GA* | ■ Lawrenceville, NJ | ■ Salt Lake City, UT* |
| ■ Atlanta, GA* | ■ Los Angeles, CA* | ■ San Diego, CA* |
| ■ Bakersfield, CA | ■ Manasquan, NJ | ■ San Francisco, CA* |
| ■ Boca Raton, FL* | ■ Memphis, TN* | ■ San Jose, CA* |
| ■ Boise, ID | ■ Naperville, IL* | ■ San Luis Obispo, CA |
| ■ Boston, MA | ■ New Providence, NJ | ■ San Mateo, CA* |
| ■ Chicago, IL* | ■ New York, NY* | ■ Seattle, WA |
| ■ Cleveland, OH* | ■ Owings Mills, MD* | ■ Solon, OH* |
| ■ Clinton, NJ | ■ Oxnard, CA | ■ St. Petersburg, FL* |
| ■ Columbia, MD* | ■ Philadelphia, PA* | ■ Tampa, FL* |
| ■ Cranford, NJ | ■ Phoenix, AZ* | ■ Tucson, AZ* |
| ■ Delray Beach, FL* | ■ Pleasant Hill, CA* | ■ Uniontown, OH* |
| ■ Denver, CO* | ■ Plymouth Meeting, PA* | ■ Walnut Creek, CA* |
| ■ East Windsor, NJ | | ■ Westlake, OH* |
| ■ Encino, CA* | | ■ Woodstock, GA* |
| ■ Greenwood Village, CO* | | |

Local Wellbeing

- | | | |
|--------------------|----------------------|------------------------|
| ■ Akron, OH | ■ Houston, TX | ■ Plymouth Meeting, PA |
| ■ Alpharetta, GA | ■ Irvine, CA | ■ San Antonio, TX |
| ■ Atlanta, GA | ■ Kansas City, MO | ■ San Diego, CA |
| ■ Austin, TX | ■ Knoxville, TN | ■ San Francisco, CA |
| ■ Brentwood, TN | ■ Lawrenceville, NJ | ■ San Jose, CA |
| ■ Boca Raton, FL | ■ Memphis, TN | ■ Seattle, WA |
| ■ Boston, MA | ■ Midland, TX | ■ Solon, OH |
| ■ Chicago, IL | ■ Murfreesboro, TN | ■ St. Louis, MO |
| ■ Cleveland, OH | ■ Naperville, IL | ■ St. Petersburg, FL |
| ■ Cleveland, TN | ■ New Providence, NJ | ■ Tampa, FL |
| ■ Dallas, TX | ■ New York, NY | ■ Uniontown, OH |
| ■ Delray Beach, FL | ■ Overland Park, KS | ■ Walnut Creek, CA |
| ■ Denver, CO | ■ Palm Beach, FL | ■ Westlake, OH |
| ■ Dublin, OH | ■ Philadelphia, PA | ■ Woodstock, GA |
| ■ Fairborn, OH | ■ Phoenix, AZ | |

National Wellbeing

- 2022 Best and Brightest Companies in Wellness
- 2022 Top Workplaces – Employee Wellbeing

* Indicates multi-award winner

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

Our People

Recognition

Recognition of our team members' hard work and contributions is an important part of their experience. We recognize and celebrate key milestones through our Service Anniversary Program. This program honors team members reaching 5, 10, 15, 20, 25 years and other significant anniversaries.

We are proud of the recognitions our professionals have received within their industries and communities. Annually, a growing number of CBIZ team members are recognized externally for their accomplishments. Please refer to [Appendix C](#) for a list of those recognized in 2021.

Steven L. Gerard Legacy Award

Steven L. Gerard served as CBIZ CEO from 2000-2016 and Chairman of the Board from 2002 until his untimely passing in 2022. Steve held a deep commitment to building a culture based on shared values with a strong focus on people. His legacy lives on through the Steven L. Gerard Legacy Award established in 2016. Each year, team members nominate individuals who exemplify CBIZ's core values from which finalists and a winner are chosen.

Learning & Development

CBIZ is proud of its efforts to be a learning organization that provides opportunities for education, technical training, professional development, leadership development coaching and awareness at every step in a team member's career. These opportunities are offered through in-person, virtual and on-demand programs. We welcome new team members through a comprehensive process that includes preparation for their role, engagement with our team and culture, and access to a variety of CBIZ resources. Please refer to [Appendix B](#) for our Enterprise-Wide Training brochure.



Enterprise-Wide Training brochure

For detailed information about content and types of training, please refer to [Appendix B](#) for our Enterprise-Wide Training brochure.

Experience

OUR 'GREAT PEOPLE, GREAT PLACE' PROGRAM

Our commitment to our people means making CBIZ a great place to work. More than 15 years ago, we established the Great People, Great Place (GP2) program with the goal of strengthening our culture, connecting our team members and supporting each other. Each year, GP2 sponsors a variety of events, activities and initiatives within our offices and teams.



Our People

Diversity & Inclusion

Over the last year, our work to advance diversity and inclusion at CBIZ continued with a strong focus on belonging and building community. We pursued this focus as part of our long-term diversity and inclusion strategy that includes all aspects of our operations and business.

We built on the success of employee resource groups (ERGs) and expanded opportunities for our team members to build broader communities based on shared experiences and identities. **CBIZ Women's Advantage (CWA)** has been active at CBIZ for more than 15 years and continues to evolve its programming to meet the needs of women across the company. In 2022, CWA sponsored the second-annual Women Transforming Business Award, which creates a platform to recognize and celebrate leaders who are driving growth and innovation in a variety of different industries and organizations. CWA also led another record-breaking annual campaign to support our long-standing partnership with Dress for Success. CWA's professional and personal development opportunities enable women to access more tailored learning as they navigate their careers.

CBIZ Young Professionals (CYP), another active ERG, also had a busy year with the scaling of their innovative mentorship program. Launched as a pilot, the overwhelming response to this program led to continued expansion to connect more of our team members with a mentor. The CYP mentorship program is one of several mentorship opportunities available at CBIZ with the goal of connecting any interested team member with a mentor. The CYP mentorship program includes training and support for both mentees and mentors. CYP continues to make progress in its efforts to help early-career professionals build a broader network across CBIZ with a specific focus on team members joining the company through acquisition.

The success of both CWA and CYP helped us expand our ERG offerings during 2022. We launched two new ERGs: **BIPOC** (Black, Indigenous, and People of Color) and **CBIZ Pride**, serving the LGBTQ+ populations. These ERGs are actively connecting team members from across the company and helping to build community with our team. These efforts support our pursuit of goals around belonging, which we recognize is critically important to our people and vital for both attracting and retaining talent.



CBIZ Boca Raton Young Professionals.

Our People

Diversity & Inclusion (cont.)

Central to our diversity and inclusion strategy is participation in the CEO Action for Diversity and Inclusion pledge network, the largest CEO-driven business commitment to advance diversity and inclusion within the workplace. During 2022, CBIZ joined numerous other CEO Action signatories in a collective effort to engage in open dialogue on issues of diversity and inclusion. These facilitated discussions held both in-person and virtually enabled our team members to listen, learn, and connect with their colleagues in new ways. These discussions will continue throughout the next year and culminate in an event to share key insights and important lessons learned to shape our long-term strategy.

CEO **ACT!ON** FOR DIVERSITY & INCLUSION



CBIZ Woodstock team members tackled an escape room together.

Finally, we continue to expand our offerings for learning and engagement on diversity and inclusion. The CBIZ Our People Matter speakers' series, a reference to one of our core values, spotlights diverse voices and experiences with external speakers and authors. Our Diversity and Inclusion Extended Learning Series encourages our team members to dig into different diversity and inclusion issues and questions through facilitated conversations. Team members read a common text and then explore it with the help of trained facilitators. We now embed diversity and inclusion content into most of our learning and development programs to increase understanding on how diversity and inclusion impact our people, business and workplaces.



CBIZ Encino team members volunteered with Operation Gratitude.

Our People

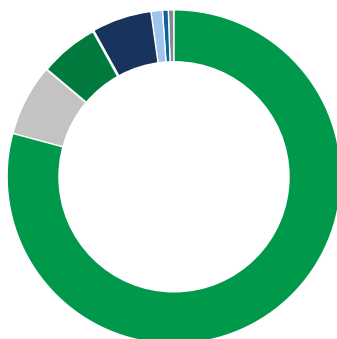
Diversity Metrics

Percentage of Team Members by Gender



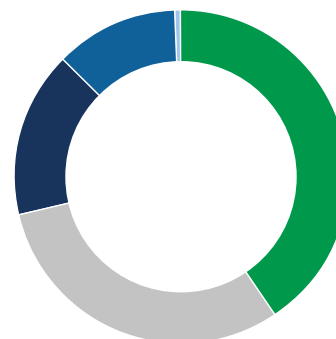
■ Women - 52%
■ Men - 48%

Percentage of Team Members by Ethnicity



■ White - 80%
■ Hispanic or Latino - 7%
■ Asian - 6%
■ Black or African American - 6%
■ Multiracial - 1%
■ American Indian or Alaska Native - <1%
■ Native Hawaiian/Pacific Islander - <1%

Percentage of Team Members by Generation



■ Millennials - 41%
■ Generation X - 31%
■ Boomers - 16%
■ Generation Z - 12%
■ Traditionalists - <1%

Percentage of Board of Directors by Gender



■ Men - 78%
■ Women - 22%

Percentage of Board of Directors by Ethnicity



■ White - 78%
■ Black or African American - 22%

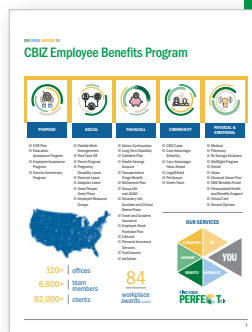
Our People

Employee Engagement

Our team members are the heart of the business, and we use companywide engagement surveys to gather feedback from our team on a routine basis. The resulting insights help drive continuous improvement across our various employee programs as we strive to be our team members' employer of choice. Our annual survey informs all aspects of employee engagement, including learning and development, culture, recognition, flexibility, compensation and benefits. Throughout the year, we also conduct 'pulse' surveys on specific topics or as part of program changes to gather timely feedback from our team.

Benefits

We offer our team members a robust benefits package, including medical, dental and vision coverage. Each benefit is designed to improve or maintain the overall health of our team members. Please refer to [Appendix D](#) for a detailed overview of our benefits.



CBIZ Employee Benefits Program

For detailed information refer to [Appendix D](#) for our CBIZ Employee Benefits Program.



CBIZ Owings Mills team members volunteered at Moveable Feast in Baltimore.

Our Community

Service

We pride ourselves on being an organization that builds long-lasting relationships with and provides support to the local communities in which we live and work. To fulfill this commitment, our CBIZ Cares Program provides team members with up to five paid hours to volunteer at local nonprofits of their choice. CBIZ Cares also encourages fundraising and support for our annual National Food Drive and Dress for Success campaigns.



Jayme Via and fellow CBIZ Austin team members volunteering at the Central Texas Food Bank.



Ellen Han, Les Wingfield and Colleen Williams of CBIZ Glen Allen, VA helping out at the Richmond food bank - Feed More.

2022 PARTNER ORGANIZATIONS

Blind Sports Organization	JARC
Boca Helping Hands	Jewish Family Services
Braden's Hope for Childhood Cancer	Junior Achievement
Brent's Place	Junior Achievement of Greater Kansas City
Carrier Strike Group NINE	KC Zoo
Central Texas Food Bank	Kids Above All
Chosen 300 Soup Kitchen Meal Service	Lead to Read
Colorado FBLA	Lynn Cancer Institute - Run for the Ribbons
Connections to Success - Dress for Success	Meals on Wheels - Senior Smiles
County United Way - Day of Caring & Sharing	Mesa Arts Academy
Cradles to Crayons	Mickey's Camp
Cricket Council USA	Mitzvah Circle
Curie PTA	Mount Elementary School
Currie Stampede	Moveable Feast
Davidson County School District	Must Ministries
Denver Botanic Gardens	National Breast Cancer Foundation
Denver Dumb Friends League	One Generation Away Ministry
Denver Pride Festival	Operation Gratitude
Douglas County Search & Rescue	Our Big Kitchen Los Angeles
Feed More	Oxnard Boys & Girls Club
Feed My Starving Children	Robert Semple Elementary
Feeding Tampa Bay	Ronald McDonald House
Food Bank of the Rockies	Sage Mountain Animal Sanctuary
Food for the Cure	Save Our Youth
Free Arts	SPCA of VA
Freudenthal Center for Parkinsons Disease	Spirit of Giving
FulFill Food Bank	St. Louis Area Food Bank
Greater Boca Raton Estate Planning Council Board Service	St. Vincent de Paul
Gumbo Limbo	The Action Center
Happy Bottoms	The Helen Gordon Davis Centre for Women
Heart to Heart	The Learning Lamp
HHH Equine/Hand, Hoof and Heart	The Riley Charles Settergren Foundation
Homeward Bound	Unexpected Blooms
Humane Society of Cambria County	WaterFire Providence
	Wreaths Across America

Our Community

Fundraising

In addition to our national food drive and Dress for Success fundraising campaigns, CBIZ team members have supported a variety of local nonprofits throughout the year, including:

- Alzheimer’s Association
- American Cancer Society
- Big Brothers Big Sisters
- Business Volunteers Unlimited
- Cradles to Crayons
- Dress for Success
- Feed My Starving Children
- International Red Cross
- Junior Achievement
- Leukemia & Lymphoma Society
- Queens College Foundation, Inc.
- Shriners Hospitals for Children
- St. Jude Children’s Research Hospital
- UNICEF
- United Way



CBIZ New England team members enjoying a summer outing at the New England Aquarium.

National Food Drive

Our 2022 campaign consisted of four donation methods – food, cash or checks, an online donation platform and payroll deductions. For the eighth year in a row, our team members generously made donations equivalent to more than one million pounds of food.



In honor of CBIZ Founder, Michael G. DeGroot, who passed away in 2022, CBIZ donated an additional \$100,000 to local food banks in conjunction with our annual food drive.

POUNDS OF FOOD COLLECTED	
2022	1,180,592
2021	1,168,449
2020	1,005,159
2019	1,072,252
2018	1,021,586
2017	1,140,960
2016	1,051,864
2015	1,026,140
2014	747,743
2013	650,776
2012	648,034
2011	576,289
2010	462,099
2009	403,146

More than 11 million pounds of food collected across the country

Our Community

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 that empowers women to achieve economic independence by providing a network of support, professional attire and the development tools to help them thrive at work and in life.

Through the 2022 employee fundraising campaign, \$100,000 was donated to local U.S. affiliates, bringing the total to more than \$850,000 donated since the partnership began in 2008. In 2021, CWA also established the Dress for Success Global Leadership University – powered by CBIZ.

Please refer to [Appendix E](#) for an infographic that details our involvement with Dress for Success.



Michele Meyer-Shipp
Chief Executive Officer
Dress for Success Worldwide

“I continue to be overwhelmed with gratitude for everything CBIZ does for our organization. Your time, talent, resources and fundraising efforts truly matter and make an enormous impact on the women we serve. The alignment around our values, our mission and what we are doing to support women, it speaks to the perfect partnership.”



The Kansas City Connections for Success honored CBIZ for their continued support of Dress for Success.



The Los Angeles CWA team chose to bring sunshine to others through a pop-up flower shop which helped to raise awareness and donations for Dress for Success.

Our Environment

Green Team

At CBIZ, we care about the natural environment. 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 environmental 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 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



CBIZ Manasquan volunteered at Fulfill working in their garden.

Our Environment

2022 Green Team Metrics

Recycling, office equipment, office supplies and facilities are the four components of our green efforts. Each year, Green Team leaders help implement and track efforts within these categories to make their office more environmentally friendly. The graphic below illustrates our 2022 actions.



481

RECYCLING

Aluminum, tin, steel, paper, plastic, glass, cardboard, toner cartridges, and single-serve coffee pods and packets

Utilize vendor for confidential document shredding and recycling

Purchase recycled paper



142

OFFICE EQUIPMENT

Utilize printers with sleep mode

Set printer default mode as double-sided

Utilize power-saving settings

Refurbish or recycle hardware and accessories



355

OFFICE SUPPLIES

Discontinue use of Styrofoam

Replace disposable plates, utensils and drinkware with reusable items

Use water filtration systems instead of bottled water



341

FACILITIES

Install motion-sensor faucets and soap dispensers

Use recycled hand towels for dispensers

Install motion-sensor lights

Update to energy-efficient lightbulbs

TOTAL GREEN ACTIONS: 1,319



Left: CBIZ Kansas City team members volunteered at St. Michael's Veteran's Center. Right: Eric Shaffstall with CBIZ Dallas was the top donor for the North Texas Food Bank's Annual Craft Beer Bonanza.

Our Environment

ECOSIA

Ecosia

In July 2021, we asked our team members to install Ecosia, a zero-cost search engine that donates at least 80% of its profits from ad revenue to plant trees where nature and people need them most. The trees Ecosia users have planted help mitigate climate change, save endangered animals, regenerate depleted soil and improve the livelihoods of local communities. The Ecosia community has planted over 170 million trees all around the world. Since adoption, CBIZ team member searches have helped plant 2,035 trees.



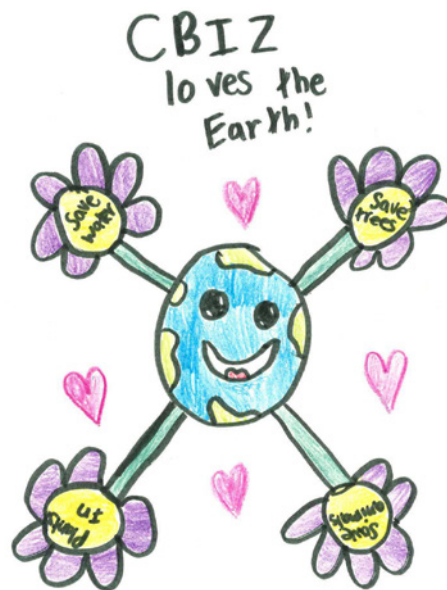
Sprout

In early 2022, CBIZ began utilizing Sprout, an IT asset management company, for the disposal and recycling of previously purchased laptops, printers and accessories, resulting in the recycling of more than 2,500 assets or 40,000 pounds of recycled materials.

Earth Day Contest

To celebrate Earth Day, the CBIZ National Green Team held their annual Earth Day Artwork Contest. The contest was open to team members' children and grandchildren in grades kindergarten through eight. Children were asked to create an original drawing that symbolized a message about environmental awareness. While paper drawings were permitted, we encouraged original drawings created by hand, on a computer or tablet to further support our environmental efforts. The only requirement was for the drawing to include "CBIZ." The grand prize was publication of the winning drawing in our 2022 CBIZ Corporate Social Responsibility Report.

We congratulate our winner, Julia, daughter of Mark Baricos, CBIZ Memphis.



Sustainability Policy

Please refer to [Appendix F](#) for a copy of our Sustainability Policy.

Appendix A

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 24)

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



CBIZ

Enterprise-Wide Training

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4-6 Financial Services

7-8 Benefits & Insurance

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9 Additional Training Programs



HR: Learning & Professional Development Programs

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.

- Part 1: Why Diversity and Inclusion Matters for CBIZ
- Part 2: Understanding Unconscious Bias and Its Impact in the Workplace
- Part 3: Creating an Inclusive Culture at CBIZ: Identifying and Disrupting Microaggressions at Work

The following are also available:

- The D&I Extended Learning Series provides a deeper dive into diversity and inclusion topics through focused reading and moderated virtual breakout sessions.
- The D&I “Our People Matter” Speaker Series features acclaimed authors and speakers who share experiences to expand recognition and learning.
- 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 team members. The following courses are CBIZ-developed and led by CBIZ HR Business Partners:

Supervisory 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 team members 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
- 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 team members. 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 team members.

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 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 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.

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 the growth of Associates and Senior Associates 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, Business Development and Giving Feedback. The session is highly interactive and uses group projects and presentations to facilitate learning.

Experienced Manager Virtual Workshop Series

These virtual 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 varies from year to year. Previous workshop topics have included affecting change through performance evaluations, maximizing profitability with effective billing strategies, and managing remote and hybrid teams. 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 Financial Services Directors/ Shareholders and up. At this conference, leadership makes presentations on the “state of the union” and shares visions of our business strategy. For those in the Attest and Tax practices, 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. 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 at CBIZ & MHM. They receive the same experience as our full-time team members. 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 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 their 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
- 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.



Benefits & Insurance

Leadership Development

Our 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 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 leadership development opportunities include:

- Building a High Performing Team
- Coaching-the-Coach
- Training-the-Trainer

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.

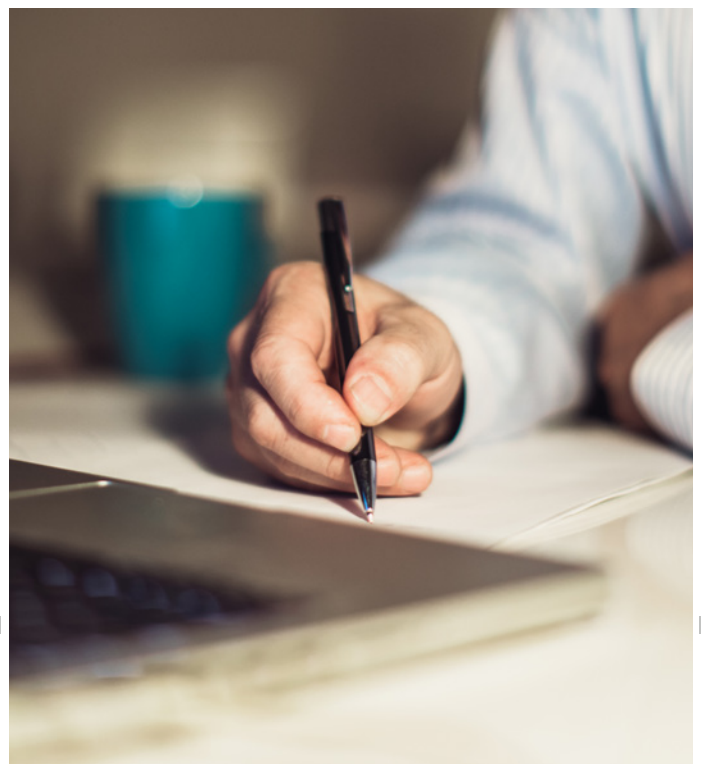
CBIZ HCM

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, mentoring and study materials are offered to assist individuals in preparing for their CPP or FPC certification exams.

Additionally, the American Payroll Association has approved 10 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 unit (Employee Benefits, Human Capital Management, Talent & Compensation Solutions, Retirement & Investment Solutions and Property & Casualty) holds a sales and training conference focusing on industry-specific content.



CBIZ Employee Benefits

Our Employee Benefits division offers a national training program called Benefits U. This program focuses on technical training and ongoing enrichment, with a continued goal of helping to better align our sales and service teams with a national approach, giving more consistency to our team members and our clients.

This program is designed to take an employee from the day they are hired through the day they retire. Trainings are offered regularly. Some are prerecorded and assigned through MyLearn; others are hosted live to allow for more interactive Q&A and placed into a library for future reference. Below are a few of the trainings offered through Benefits U:

- **Featured Client Friday** – Local offices from around the country present client case studies, showcasing the work we've done for them. In addition to lending greater awareness to the depth of our national client base, this allows us to highlight the great work our client service teams are doing and learn from each other in the process.
- **National Client Service Training** – These trainings focus on both technical and enrichment topics and are dedicated to the development of our client service team. Trainings are led by team members and are hosted live to promote collaboration and accommodate Q&A.
- **National Sales Training** – These trainings focus on both sales knowledge and system topics dedicated to helping sales professionals meet their annual goals. Topics are developed based on feedback received from our team members. Trainings are held live to promote collaboration and accommodate Q&A.
- **Client Service Academy** – This is a program designed to assist CBIZ with recruiting and retention efforts, starting with the entry-level position of Account Coordinator and Sales Development Representative. The Academy provides greater training and development of our early-career team members and furthers our division's ongoing goal of increasing consistency and integration. Additionally, the Academy is designed to create a pipeline of talent for future client service and sales positions within CBIZ Employee Benefits.

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.

Spark: CWA Personal Growth Series

The focus of Spark, formerly Networking Circles I, is personal development, designed to create a support network that builds self-confidence and skill building among early to mid-career women at CBIZ. The program is 8-9 months, involving a series of facilitated small-group meetings. This program includes:

- Goal Setting
- 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



Ignite: CWA Professional Growth Series

The focus of Ignite, formerly Networking Circles II, 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. Ignite is a 9-month 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

Enlighten: CWA Personal Growth Series

CWA believes that absorbing content from impactful resources like books, articles and podcasts can challenge, inspire and make us hungry for more. However, the experience is not fully complete until we've shared our thoughts with others. Research tells us that the best way to remember new ideas and put them into action is to share our takeaways and opinions. Enlighten, formerly Book Clubs, is open to all CBIZ team members; it is not limited to those who identify as female. Participants commit for one year at a time and, with their group, choose a book from a list of content focused on developing personal, professional and leadership competencies. CWA furnishes copies of any book chosen, and a leader is selected from within a group.

MasterClass Series

These include quarterly live webinars intended to educate, inspire and promote growth in leadership competencies among all CBIZ team members. Recordings may be accessed in the MyLearn library.

Additional Training Programs

QuickHelp

Select "QuickHelp" under Applications on CBIZ Central to access your personal BrainStorm QuickHelp portal for training on 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.

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 Oktopost





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 C

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 2022 awards and thank them for helping to make CBIZ a success.



Juliana Alvey
2022 NextGen Leaders
Kansas City Business Journal



Tami Bolder, Ph.D.
Next Generation Fellow
Construction Financial
Cleveland Metropolitan Bar Foundation



Cheryl Calhoun
- The Most Influential Women Leaders of the Year | *The Victory Magazine*
- Minority of Influence: CPAs | *Los Angeles Business Journal*
- Women of Influence: Accounting | *Los Angeles Business Journal*



Maggie Carson
GenXYZ
ColoradoBiz Magazine



Jennifer Gage
Top Women Advisors - All Stars
National Association of Plan Advisors



Jeff Gluck
Notable Leaders in Accounting and Consulting
Crain's New York Business



Dan Hawkinson
2022 Everyday Heroes and Heroines
Colorado Society of CPAs



Carrie Hobrough
2022 Emerging Leader and 2022 Leaving a Legacy
Clayton Chamber of Commerce



Sarah Jackson
- Women to Watch - Leader of Note
Colorado Society of CPAs
- Women to Watch - (CO)
AICPA



Ryszard (Rich) Jania
2022 Accounting Power 50
NIBIZ



Maya Khan
Top 50 Women in Business
Long Island Business News



Allan Klose
2022 Person to Know in Commerica Real Estate
AZ Big Media



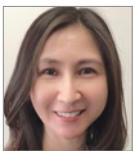
Andy Kubrick
- Who's Who in Accounting & Payroll 2022
- Top 60 Influencers
Long Island Business News



Alex Lanning
Connections to Success Award
Dress for Success, Kansas City



Marc List
2022 Top 250 Power Leaders
South Florida Business Journal News



Betty Liu
Women of Influence: Accounting
Los Angeles Business Journal



Anne Long
Irish America Wall Street 50
Wall Street Journal



Jennifer McHugh
Connections to Success Award
Dress for Success, Kansas City



Chuck McLane
AZ Business Leaders 2022
AZ Big Media

Continued

CBIZ Celebrates Our Recognized Professionals



Paul Nation
2022 CWA Champion
CBIZ Women's Advantage



Amanda Newell
Connections to Success
Award
*Dress for Success,
Kansas City*



Elizabeth Newman
2022 Mentor of the Year
Engage Cleveland



Cindy Orr
Top Women Advisors –
Captains
*National Association of Plan
Advisors*



Jim Parks
500 Most Influential Leaders
& Executives in Los Angeles
- Professional Services
Los Angeles Business Journal



Kristen Peed
2022 Five-Star Professional
Liability
*Insurance Business
Magazine*



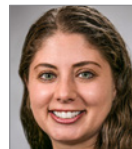
Veronica Quintana
Top 50 Women in Business
Pacific Coast Business Times



Pam Reeder
Connections to Success
Award
*Dress for Success, Kansas
City*



Abe Schlissfeld
- Alumnus of the Year
Mesivta Yeshiva Rabbi Chaim Berlin
- Notable Leaders in Accounting and Consulting
Crain's New York Business



Darya Shneyder
2022 Notable Leaders in Real
Estate
Crain's New York Business



Jessica Strom
2022 Notable Leaders in
Accounting & Consulting
Crain's New York Business



Steve Sublett
Top 50 Most Influential Black
Leaders
San Diego Business Journal



Sibi Thomas
Notable Leaders in
Accounting and Consulting
Crain's New York Business



Janet Thompson
Connections to Success
Award
*Dress for Success, Kansas
City*



Caitlin Waters
2022 NextGen Leaders
Kansas City Business Journal

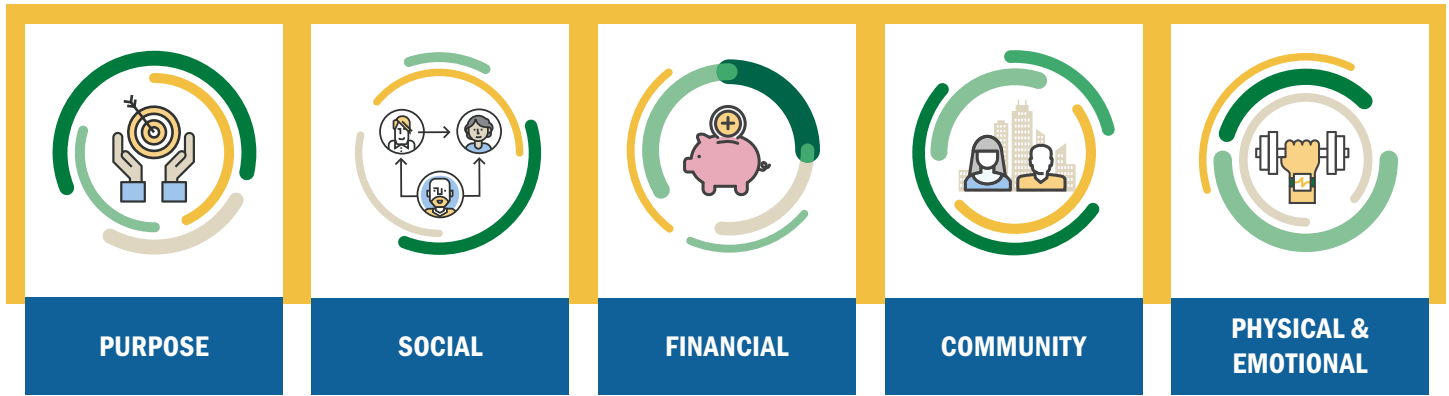


Katherine Zheng
Emerging Leaders Award
2022
*New York State Society of
CPAs*

Appendix D

Employee Benefits Program

CBIZ Employee Benefits Program



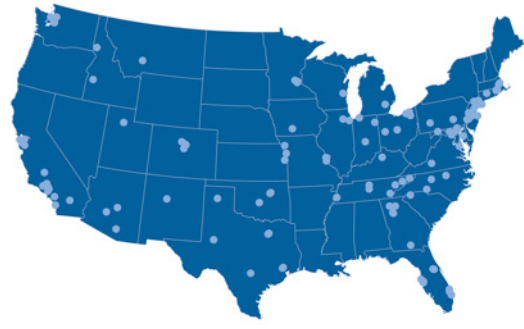
- PURPOSE**
- 529 Plan
 - Education Assistance Program
 - Employee Assistance Program
 - Service Anniversary Program

- SOCIAL**
- Flexible Work Arrangements
 - Paid Time Off
 - Parent Program
 - Pregnancy Disability Leave
 - Parental Leave
 - Adoption Leave
 - Great People, Great Place
 - Employee Resource Groups

- 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
 - LifeLock
 - Personal Insurance Services
 - TrueConnect
 - IonTuition

- COMMUNITY**
- CBIZ Cares
 - Care Advantage: SitterCity
 - Care Advantage: Years Ahead
 - LegalShield
 - Pet Assure
 - Green Team

- PHYSICAL & EMOTIONAL**
- Medical
 - Pharmacy
 - Rx Savings Solutions
 - WellRight Program
 - Dental
 - Vision
 - Discount Vision Plan
 - CBIZ Benefits Portal
 - Personalized Health and Benefits Support
 - Virtual Care
 - Second Opinion



120+ offices
 6,500+ team members
 82,000+ clients

84 workplace awards in 2022



CBIZ Employee Benefits Program (cont.)



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

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

EDUCATION ASSISTANCE PROGRAM: Provides for reimbursement of eligible tuition expenses on a pre-tax basis.

EMPLOYEE ASSISTANCE PROGRAM: Provides confidential assessment, short-term counseling and referral services for employees and family members in need of assistance with personal matters.

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.



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

FLEXIBLE WORK ARRANGEMENTS: CBIZ offers arrangements that allow team members 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 parents as they navigate preparing for a new child and managing any challenges that may occur while coming back to work after an extended leave.

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 after the birth or adoption of a child.

ADOPTION LEAVE: Paid adoption leave is available to an eligible team member to provide parental care associated with the adoption of a minor child for bonding purposes.

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.

EMPLOYEE RESOURCE GROUPS (ERG): Team members can participate in CBIZ BIPOC (Black, Indigenous, & People of Color), Pride (LGBTQ+), Women's Advantage and Young Professionals ERGs for support and to build community at work.

CBIZ Employee Benefits Program (cont.)



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 for medical, dental, and vision expenses not covered by insurance, adoption expenses, and dependent daycare expenses.

HEALTH SAVINGS ACCOUNT (HSA): Save money on a pre-tax basis to pay for qualified medical expenses through payroll deductions directly to an HSA.

TRANSPORTATION FRINGE BENEFIT (SECTION 132): Save money to cover parking and/or mass transit expenses incurred while commuting.

RETIREMENT PLAN: Team members 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.

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.

LIFELOCK: Identity theft and credit monitoring protection.

PERSONAL INSURANCE SERVICES: Policy and coverage reviews by CBIZ insurance professionals.

TRUECONNECT: Voluntary short-term loan program.

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

CBIZ Employee Benefits Program (cont.)



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

CBIZ CARES: Each year, CBIZ encourages all team members to volunteer up to five paid hours at a nonprofit organization selected by their CBIZ location.

CAREADVANTAGE:

Sittercity – Find babysitters, nannies, dog walkers, pet sitters and caregivers to assist with special needs, companion care, homework help, and housekeeping.

Years Ahead – View profiles of senior care providers, including photos, details regarding their experience, capabilities, pricing and reviews.

LEGALSHIELD: Access quality legal services through a nationwide network of provider law firms.

PET ASSURE: Discounts on veterinary services at 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.



Having good health and enough mental energy to getting things that are important to you done each day

MEDICAL: Four medical plan options featuring Anthem Blue Cross Blue Shield's national network of providers.

PHARMACY: Prescription coverage through CVS/Caremark. Prescription drug coverage administered by CVS/Caremark with coverage at most major pharmacy chains nationwide.

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.

WELLRIGHT WELLNESS PROGRAM: Team members enrolled in a CBIZ-sponsored medical plan who choose to participate in the program receive discounted medical premiums.

DENTAL: CBIZ offers three dental options through Delta Dental of Kansas with a nation-wide network of providers.

Continued on next page

CBIZ Employee Benefits Program (cont.)



Having good health and enough mental energy to getting things that are important to you done each day

VISION: Two vision insurance options are available through Vision Service Plan (VSP).

DISCOUNT VISION PLAN: Discounts on vision products and services obtained through a participating VSP in-network provider.

CBIZ BENEFITS PORTAL: All CBIZ team members can access information about the CBIZ Benefits program on the Accolade portal.

PERSONALIZED HEALTH AND BENEFITS SUPPORT: For medical plan participants, CBIZ has partnered with Accolade to provide personalized support from Health Assistants and Nurses.

VIRTUAL CARE: Virtual Care is available to medical plan participants for mental health care, urgent care and primary care with up to 12 visits at no cost.

SECOND OPINION: Medical plan participants can connect with leading specialists to discuss new or existing diagnosis.



Appendix E

CWA DFS Infographic



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

About CBIZ Women's Advantage

- Established in **2007**
- **CWA board members** represent service lines and geographies across the nation

“

I continue to be overwhelmed with gratitude for everything CBIZ does for our organization. Your time, talent, resources and fundraising efforts truly matter and make an enormous impact on the women we serve. The alignment around our values, our mission and what we are doing to support women, it speaks to the perfect partnership.

– **MICHELE MEYER-SHIPP**
Chief Executive Officer, Dress for Success Worldwide



DRESS FOR SUCCESS[®]
Going Places. Going Strong.

”

CWA National Leadership



LORI NOVICKIS
National
CWA Leader



SHERRY BURICK
CWA National
Community Outreach
Co-Chair



AMY GRANT
CWA National
Community Outreach
Co-Chair

CWA's Support of Dress for Success

- 2022 marked the **15th year** of partnering with DFS
- Monetary donations: **\$850,000+**
- Donated **more than 61,000** professional clothing items, accessories or toiletries
- 13 CBIZ women have served on boards of **11 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



cbiz.com/cwa

cbizwomensadvantage@cbiz.com

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.
- 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.

Appendix G

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 visit our **Privacy Policy** at cbiz.com/privacy-policy.

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 2022. For more information on our diversity and inclusion efforts, please refer to **page 12** of this report.

Workforce by Gender	
Male	48%
Female	52%

Workforce by Race/Ethnicity	
White	80%
Black or African American	6%
Hispanic or Latino	7%
Asian	6%
Native Hawaiian or Pacific Islander	<1%
American Indian or Alaska Native	<1%
Multiracial	1%

Workforce by Generation	
Gen Z	12%
Millennials	41%
Gen X	31%
Baby Boomer	16%
Traditionalists	<1%

(continued on page 50)

Workforce Turnover	
Total	19%

Board of Directors by Gender	
Male	78%
Female	22%

Board of Directors by Race/Ethnicity	
White	78%
Black or African American	11%
Multiracial	11%

Workforce Engagement

Our over 6,500 team members are the heart of the business, and we use company-wide engagement surveys to gather feedback from our team on a routine basis. The resulting insights help to drive continuous improvement across our various employee experience and engagement programs as we strive to be our team members' employer of choice.

Each year we conduct two employee engagement surveys: one internal and one external third-party survey. Each survey ultimately informs all aspects of employee engagement including learning and development, culture, recognition, flexibility, compensation, and benefits. Throughout the year, we also conduct 'pulse' surveys on specific topics or as part of program changes to gather timely feedback from our team.

During 2022, CBIZ was recognized as one of **America's Best Midsize Employers** by Forbes (for the fifth time), was certified as a *Great Place to Work*, and received 84 national and local workplace and health and wellness including being named a Top 100 Firm by *Accounting Today*, and a Best Place to Work In Insurance (for the eighth consecutive

year). For more information on workplace awards and recognitions, see **page 10**.

Professional Integrity

The success of CBIZ is directly tied to our reputation for integrity in the marketplace. We earn client, 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 7 & 8**, as well as the corresponding link to our **Code of Professional Conduct and Ethics** on our website.

**As of May 10, 2023, J. DiMartino and S. Hudson retired from the CBIZ Board of Directors.*



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

Cover (main): CBIZ Encino and Los Angeles volunteered at 'Our Big Kitchen' in Los Angeles. Cover (left): CBIZ Oxnard team members volunteered at the Boys And Girls Club. Cover (middle): CBIZ St. Louis team members volunteered at the St. Louis Area Foodbank. Cover (right): CBIZ Boston team members volunteered at Cradles to Crayons. Back page (top): CBIZ Valuation. Back page (bottom): 60 CBIZ Phoenix team members made 28,728 meals that will feed 78 kids for an entire year.