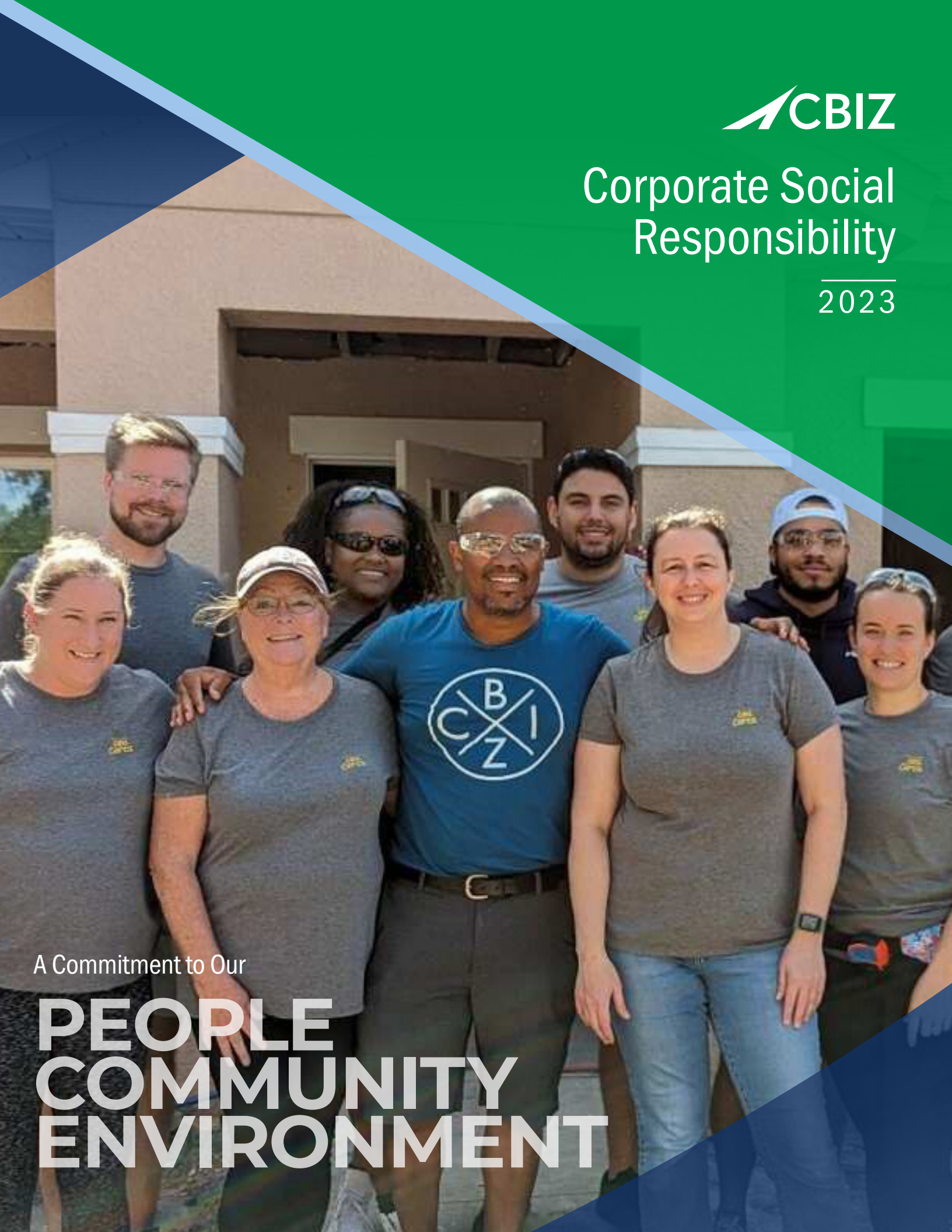




Corporate Social Responsibility

2023



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

Breaking Away From The Competition

In 2023, we experienced another consecutive year of financial growth with every major service line contributing to our results, demonstrating the strength and resilience of our business model even in a dynamic market. We achieved these results and other important strategic milestones during the year while remaining steadfast in our commitment to the growth and development of our team and meaningful engagement in the communities where we live, work, and serve. I am especially proud that our values-based and people-centered culture was recognized by a record-setting 100 workplace awards in 2023. This achievement is another example of how we are differentiating ourselves in ways that enable us to **break away from the competition** and increase value for all our stakeholders.

Our commitment to corporate citizenship ties directly to our CBIZ core values which guide every aspect of how we lead our business. We are proud to share the positive outcomes of our efforts over the past year and the steps we are taking to continue to expand our impact moving forward.

We continue to advance diversity and inclusion as a fundamental component of attracting top talent and building and strengthening our team. Our employee resource groups (ERGs) help to build our CBIZ community and ensure that all our team members feel a sense of belonging. Our newer ERGs – BIPOC (Black, Indigenous, and People of Color) and CBIZ PRIDE, serving our LGBTQIA+ populations – hit their stride in 2023 by welcoming new members and recognizing the contributions of these groups to our overall success. Our two long-standing ERGs – CBIZ Women's Advantage (CWA) and CBIZ Young Professionals (CYP) – continue to offer robust programs and valuable resources to our team members while also elevating the CBIZ brand in our communities.

CBIZ Cares, our companywide community engagement initiative, had another successful year with an increase in volunteer engagements by our team members, with more than 830 individuals contributing more than 3,900 hours in 2023. Once again, CWA led the way with a record-setting campaign to support Dress for Success, our longtime partner that offers support and assistance to women working toward their professional and personal goals. Additionally, our annual food drive exceeded our goal of donating one million pounds to benefit food banks across the country.

Finally, our CBIZ Green Team, which was established to develop practical and actionable solutions to support sustainable environments within each of our local offices, continues to help reduce our environmental footprint, efficiently use resources to reduce waste and educate our team on how to make sustainable choices every day.

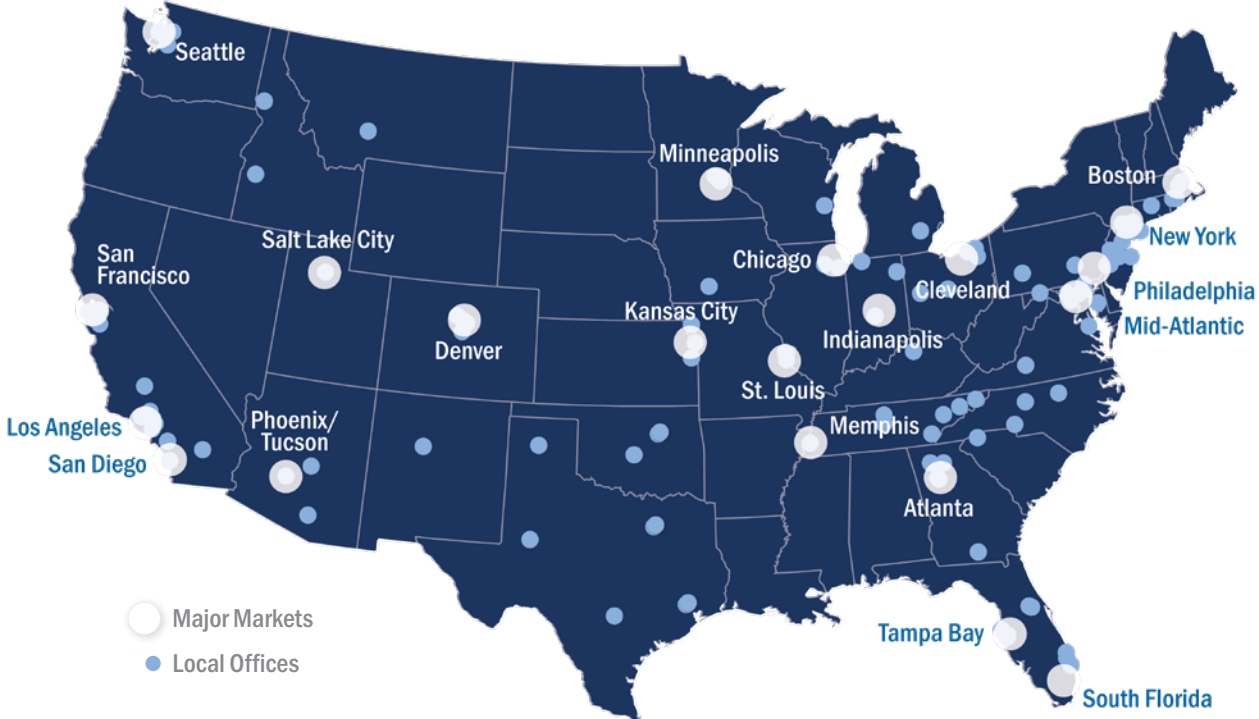
While we are proud of the progress we have made, we recognize that our efforts are part of an ongoing journey. We remain committed to engaging with and listening to feedback from our stakeholders, including our team members, clients, investors, and community partners, as we strive to drive value and be an effective and impactful corporate citizen.

I would like to extend my gratitude to our dedicated team members who contribute to our efforts. By working together, I am confident we will continue to identify new opportunities to **break away from the competition** in our efforts to build a more inclusive and sustainable future.



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

CBIZ SNAPSHOT



REVENUE
\$1.6B+



21
MAJOR
MARKETS



120+
OFFICES

MARKET CAP
~\$3.5B+



100
WORKPLACE
AWARDS



CBZ
NYSE

TEAM MEMBERS
6,700+

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 Denver volunteers spent a day at Metro Cares and performed a variety of activities.

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



Gina D. France



Jerome P. Grisko, Jr.



Richard T. Marabito



A. Haag Sherman



Todd J. Slotkin



Benaree Pratt Wiley



Rodney A. Young

OUR COMPANY

Corporate Governance

As a publicly traded company, CBIZ's (NYSE: CBZ) goal is 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 copy of our Human Rights Policy.



CBIZ Los Angeles joined Kidsave's "Hike With Your Heart" event.



CBIZ Cumberland held a summer tailgating event.

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 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 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 Minneapolis took part in the Polar Plunge to raise money for Special Olympics.

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 team members 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 team members are required to complete a two-part ethics course within their first 10 days of employment, with refresher courses assigned every few years.

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. Team members 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 multidisciplinary, 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 6,700 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.



CBIZ Kansas City took a moment to have some fun during busy season.

Our Pledge

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 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.



CBIZ Phoenix and Scottsdale worked with Packages From Home to send care packages to our troops and at-risk veterans.

OUR PEOPLE

100 WORKPLACE AWARDS IN 2023



National Workplaces

- 2023 Top Workplaces USA
- 2023 Best and Brightest Companies in the Nation
- 2023 Top Workplaces – Culture Excellence in Leadership, Purpose and Values, Work-Life Flexibility, Compensation and Benefits, Innovation, Employee Appreciation, Professional Development
- 2023 Best Places to Work in Insurance
- 2023 Early Talent Award
- 2023 Ripplematch Campus Forward Winner
- 2023 Eddy Award
- 2023 UKG Partner of the Year
- 2023 Top Workplaces – Financial Services Industry
- 2023 *Fortune* Best Workplaces for Women

Local Office Workplaces

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

Certifications & Ranking

- 2023 Great Place to Work Certification
- 2023 America's Best Tax Firms
- 2023 America's Best Accounting Firms
- 2023 Top 500 Entry Level Employer
- 2023 Top 100 Intern Employer
- 2023 Top 100 Institutional Consulting Teams
- 2024 Vault Most Prestigious Accounting
- 2024 Vault Best Accounting Firms – Forensic Accounting
- 2024 Vault Accounting Firms for Tax Accounting
- 2024 Vault Best Accounting Firms for Audit & Assurance Accounting**
- 2024 Vault Top 25 Accounting Internships
- 2023 Top 10 Defined Benefits Administrator
- 2023 Top 100 Brokers List
- 2023 Top 100 Firms – *Accounting Today*

Local Wellbeing

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

National Wellbeing

- 2023 Best and Brightest Companies in Wellness
- 2023 Top Workplaces – 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 the CBIZ employee 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. Refer to [Appendix C](#) for a list of those recognized in 2023.

Steven L. Gerard Legacy Award

Steven L. Gerard served as CBIZ CEO from 2000 to 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. Finalists and a winner are chosen from these nominees.

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 Enterprisewide Training brochure.



Enterprisewide Training

For detailed information about content and types of training, please refer to [Appendix B](#) for our Enterprisewide 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.



CBIZ Woodstock, GA volunteered at Must Ministries, where they packed boxes of food that fed 180 families in need.

OUR PEOPLE

Engagement & Belonging

Over the last year, our continued work to advance diversity and inclusion at CBIZ emphasized 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)** was established in 2007 and continues to evolve programming to meet the needs of women across the company. In 2023, CWA sponsored the third-annual Women Transforming Business Awards, a platform to recognize and celebrate external U.S.-based leaders who are driving growth and innovation in different industries and organizations. CWA led another record-breaking annual campaign to support our long-standing partnership with Dress for Success by donating \$120,000 to bring the lifetime total to nearly \$1 million. CWA celebrated 120 women graduates from professional and personal development programs while providing educational opportunities to a total of 1,500 team members. CWA provided internal recognition opportunities for 228 of our women through the Women to Watch initiative while also recognizing our internal male allies. Refer to Appendix E to review the [2023 CBIZ Women’s Advantage Year in Review](#) for more details.

CBIZ Young Professionals (CYP) continues to drive growth, education and connection in the CBIZ community through its programming. CYP hosted several

engagement opportunities this year, including Summer School, Adulting Week and its signature Professional Development Award. Alongside these initiatives, CYP continued to expand and grow the CBIZ Mentorship Program, which provides opportunities for connection and idea sharing across divisions, regions and role hierarchy. CYP remains committed to helping build the CBIZ culture across the organization.

More than 200 team members have joined our newest ERGs – CBIZ BIPOC (Black, Indigenous, and People of Color) and CBIZ PRIDE, serving LGBTQIA+ individuals throughout CBIZ – as members or allies.

CBIZ BIPOC was created to nurture a sense of belonging for BIPOC team members and to provide a community that counters feelings of being an “only.” This ERG increases the visibility of underrepresented groups within CBIZ, facilitates and encourages allyship, and helps foster a culture of inclusion. In 2023 the ERG introduced the CBIZ BIPOC Awards, receiving 78 nominations in their inaugural year. The awards celebrate the achievements of CBIZ BIPOC employees in three categories: Empowering Leadership, Change Maker, and Rising Leader.

CBIZ Pride developed its mission and vision and finalized marketing materials to help raise awareness in 2023. In early 2024, the ERG launched its first CBIZ PRIDE Awards that recognize, honor and celebrate the efforts, contributions and achievements of LGBTQIA+ CBIZ team members and allies. The 2024 CBIZ PRIDE Awards will honor our team members in three categories: Community, Champion and Leadership.



OUR PEOPLE

Engagement & Belonging *(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 in person and virtually, enabled our team members to listen, learn, and connect with their colleagues in new ways. In 2023, more than 2,330 team members engaged in this discussion.

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 consider 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.

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



CBIZ Cleveland volunteered at the Cleveland Kids Book Bank, where they sorted and boxed books.



CBIZ Knoxville assisted with packing bags of food at Second Harvest of Tennessee.

OUR PEOPLE

Workforce Demographics

Percentage of Team Members by Gender



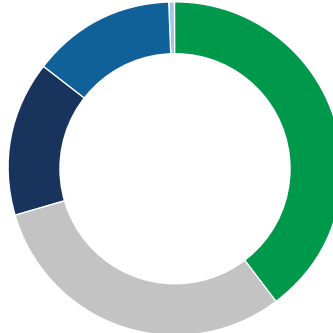
■ Women - 52%
■ Men - 48%

Percentage of Team Members by Ethnicity



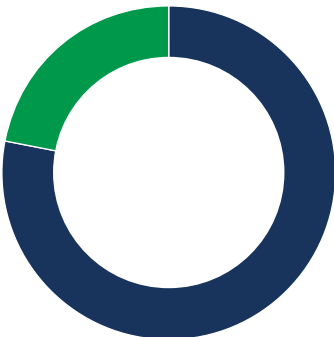
■ White - 79%
■ Hispanic or Latino - 7%
■ Asian - 6%
■ Black or African American - 6%
■ Multiracial - 1%
■ American Indian or Alaska Native - <1%
■ Native Hawaiian/Pacific Islander - <1%

Percentage of Team Members by Generation



■ Millennials - 40%
■ Generation X - 31%
■ Boomers - 15%
■ Generation Z - 14%
■ 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 Feedback

Our team members are the heart of our 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 programs as we strive to be our team members' employer of choice. Our annual survey informs all aspects of team member engagement, including learning and development, culture, recognition, flexibility, compensation and benefits. In 2023, survey participation increased more than 10%, and we achieved an overall positive feedback rate of 72%, which ranks near the top of similarly sized companies. 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.



The infographic titled "CBIZ Employee Benefits Program" lists various benefits under five categories: Health, Dental, Vision, Life, and Disability. It also includes a map of the United States with statistics: 120+ offices, 6,700+ team members, and 100,000+ clients. A logo for "PERFECT YOU" is also present.

CBIZ Employee Benefits Program

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



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, we established our CBIZ Cares program in which team members are offered up to eight paid hours to volunteer with their teammates and an additional eight paid hours to volunteer individually. CBIZ Cares also encourages fundraising and support for our annual National Food Drive and Dress for Success campaigns.



CBIZ Boca Raton volunteered at the July 4 party at Mae Volen Senior Center.

2023 PARTNER ORGANIZATIONS

Akron-Canton Regional Food Bank	Mitzvah Circle
American Red Cross	Must Ministries
Barkin' Basement Thrift Shop	Newhouse
Boca Helping Hands	Overland Park Arboretum & Botanical Gardens
Christ United Lutheran Church	Packages From Home
City Meals on Wheels	Partnership for Parks
Cleveland Kids Book Bank	Rescue Mission Thrift Store
Elmwood Park Zoo	Roanoke City
Fresh Start Women's Foundation	San Diego Blood Bank
Fulfill Food Bank of Monmouth & Ocean Counties	San Diego Food Bank
Great Rivers Greenway	Second Harvest Food Bank of Middle TN
Greater Cleveland Food Bank	Second Harvest of TN
Gumbo Limbo Nature Center	Spirit of Giving Network
Habitat for Humanity	SRVS Kids
Hand, Hoof & Heart	St. Louis BWorks
Happy Bottoms	St. Mary's Food Bank
JARC of Boca Raton	St. Vincent de Paul
Junior Achievement	USS Midway
Kids Above All	Wayside Waifs
Mae Volen Senior Center	Western Maryland Food Bank
Magic Horse Therapeutic Riding Center	Westminster Neighborhood Services
Meals of Hope	Whittier Elementary
Metro Cares	



CBIZ St. Louis participated in the Revamp the Riverfront Cleanup Series. Our volunteers cleaned and removed trash from the St. Louis riverfront, keeping more than 20 bags of trash from entering the Mississippi River.

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 San Diego volunteered at the San Diego Food Bank, where they washed apples and packed food.

National Food Drive

Our 2023 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.



POUNDS OF FOOD COLLECTED	
2023	1,177,749
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 13 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 development tools to help them thrive at work and in life.

Through the 2023 employee fundraising campaign, \$120,000 was donated to local U.S. affiliates, bringing the total to more than \$970,000 donated since the partnership began in 2008.



“Thank you for being committed to us. Thank you for your engagement with us and the partnership. It is your time, talent and treasure that allows all the affiliates you support to do what they do in service of the women we serve every single day. We literally couldn’t do it without you.”

Michele Meyer-Shipp
Chief Executive Officer, Dress for Success Worldwide



Our Memphis office sponsored a table at the Little Black Dress event supporting Dress for Success Memphis.



Our Kansas City office attended the annual Tribute to Success in support of Dress for Success Kansas City.

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, NJ volunteers worked in the garden of Fulfill Food Bank of Monmouth & Ocean Counties.

OUR ENVIRONMENT

2023 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 2023 actions.



558
ACTIONS

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



164
ACTIONS

OFFICE EQUIPMENT

Utilize printers with sleep mode

Set printer default mode as double-sided

Utilize power-saving settings

Refurbish or recycle hardware and accessories



397
ACTIONS

OFFICE SUPPLIES

Discontinue use of Styrofoam

Replace disposable plates, utensils and drinkware with reusable items

Use water filtration systems instead of bottled water



355
ACTIONS

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: 1,474



CBIZ NYC volunteered with Partnership for Parks. Our team painted 80 feet of fencing to help beautify a local park, ensuring a welcoming space for the community.

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 200 million trees around the world. Since adoption, CBIZ team member searches have helped plant 2,846 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 6,700 assets or 96,000 pounds of recycled materials.

Earth Day Contest

To celebrate Earth Day, the CBIZ National Green Team held its annual Earth Day Artwork Contest. The contest was open to team members' children and grandchildren in kindergarten through eighth grade. 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 a 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 CBIZ Corporate Social Responsibility Report.



We congratulate our winner, Danica, daughter of Alan Klose, CBIZ Phoenix.

Sustainability Policy

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 ethical 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 right 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 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.

APPENDIX B

ENTERPRISEWIDE TRAINING

CBIZ

Enterprisewide Training



ACCOUNTING | INSURANCE | ADVISORY

CBIZ

Enterprisewide Training

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7-8 Benefits & Insurance

8-9 CBIZ Women's Advantage

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 “Day of Understanding” is a collective opportunity to lead open dialogue and inspire change through in-office or remote events to discuss issues and current events related to D&I.
- 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



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 annually provides over 75 technical webinars, covering accounting, auditing, tax, technology and industry-focused topics. In addition, employees have access to various self-study libraries via MyLearn, 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.

Orchestrate University

Orchestrate University (OU) is a self-paced, blended learning program for National Advisory Associates, Senior Associates and Managers. OU focuses on 10 core skills understood to be characteristic of successful project managers. Presented in the context of their specific level, the curriculum features highly interactive micro-modules, field experience guides and coaching prompts.

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 team member 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.



National Intern Learning Series

The National Intern Learning Series consists of several live virtual sessions designed to introduce interns to CBIZ. Interns hear from senior leaders on topics such as leadership, corporate social responsibility, innovation and strategic vision. Other sessions are devoted to development topics (e.g., passing the CPA exam) or to facilitate breakouts where interns can cultivate relationships with peers across the country.

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 and various other exam-related expenses. CBIZ awards a CPA exam passing bonus between \$1,000 and \$5,000.

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, as well as various other exam-related expenses. 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.

Additional leadership development opportunities include:

- Building a High-Performing Team
- Leading Through Change
- Conflict 101: Understanding & Resolving
- Coaching the Coach
- Train 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.

ServiceSkills

Online training through ServiceSkills.com, America’s premier provider of communication training content and tools, is designed to improve internal and external communication skills, with techniques set as “standards” for demonstrating excellence in customer service. More than 150 proven communication and leadership skills and techniques are taught through 22 series, such as:

- Service Matters
- 8 Keys to a More Respectful Workplace
- WACTEOsm Internal Customer Service

Successful training is applying the skills learned and making them a part of day-to-day conversations with clients and coworkers.

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 team member 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:

- 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 & Sales Academy (CSSA) – This onboarding program, attended by all new hires, is designed to train new hires on CBIZ processes and our client engagement cycle and assist CBIZ with recruiting and retention efforts in a competitive job market. CSSA provides training and development of our team members and furthers the division’s ongoing goal of increasing consistency and integration across all offices.

CBIZ Women’s Advantage

The goal of CBIZ Women’s Advantage (CWA) is to create a competitive advantage to help CBIZ attract, retain and engage a talented workforce and to raise up the next generation of leaders. We do this by providing personal, professional and business development training and opportunities. The following is an overview of the professional development programs.

Spark: CWA Personal Growth Series

The focus of Spark 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 eight months long, 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 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. Ignite is an eight-month program, involving a series of facilitated small-group meetings. This program includes:

- The CBIZ Trusted Advisor & Trust Equation
- DISC
- Salespeople & Sales Styles
- 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 is open to ALL CBIZ team members. Participants commit for one year at a time and, with their group, choose books, articles and podcasts from a curated list of options focused on both professional and personal development. CWA furnishes copies of any book chosen, and a leader is selected from within a group.

MasterClass Series

MasterClass is open to ALL CBIZ team members. These quarterly live webinars with CBIZ leaders are intended to educate, inspire and promote growth in leadership competencies among 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 ways to get involved with social media, including:

- How to Use Oktopost
- How to submit culture-related happenings to be featured on corporate social media channels
- How to access branded LinkedIn background images

For more information and in-depth training resources, visit our [Social Media Resource Center](#).





**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 2023 awards and thank them for helping to make CBIZ a success.



Melissa Black
Top Women Advisors: Rising Stars
National Association of Plan Advisors (NAPA)



Tami Bolder
Power of Change Honoree
The Ohio Society of CPAs



Cheryl Calhoun
Minority of Influence: CPAs – *Los Angeles Business Journal*
2023 Women of Influence: Accountants – *Los Angeles Business Journal*
Top 100 Accountants – *Los Angeles Business Journal & CalCPA*



Katie Carrothers
2023 Campus Recruiting Choice Awards
Ripplematch



David Diamond
SD 500: Influential Business Leaders
San Diego Business Journal



Jennifer Gage
Top Women Advisors: All Stars
National Association of Plan Advisors (NAPA)



Sheree Harrison
Diversity, Equity & Inclusion Champions
Los Angeles Business Journal



Heather Hernandez
Top 50 Women of Influence in Accounting and Finance
San Diego Business Journal



Howard Hoff
Notable Leader in Accounting, Tax and Audit
Crain's New York Business



Dan Johnson
St. George National Award
American Cancer Society



Betty Liu
2023 Women of Influence: Accounting
Los Angeles Business Journal



Dana Marti
Top 50 Women in Business
Long Island Business News



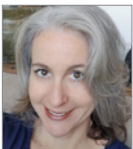
Caitlyn O'Neil
Women to Watch – Emerging Leader
Colorado Society of CPAs



Jim Parks
Top 100 Accountants
Los Angeles Business Journal & CalCPA



Veronica Quintana
Top 50 Women in Business on the Central Coast
Pacific Coast Business Times



Erin Ricardez
Diversity, Equity & Inclusion Champions
Los Angeles Business Journal



Rachel Roberts
Everyday Heroes and Heroines
Colorado Society of CPAs



Karl Seitz
Thriving in Their 40s
Los Angeles Business Journal



Jing Shen
Thriving in Their 40s
Los Angeles Business Journal
Top 100 Accountants
Los Angeles Business Journal & CalCPA



Melinda Stinnett
Outstanding Entrepreneur
University of Tulsa's Collins College of Business
Hall of Fame Inductee



Jay Silver
Notable Leader in Accounting, Tax and Audit
Crain's New York Business



Steve Sublett
Top 50 Black Leaders of Influence
San Diego Business Journal

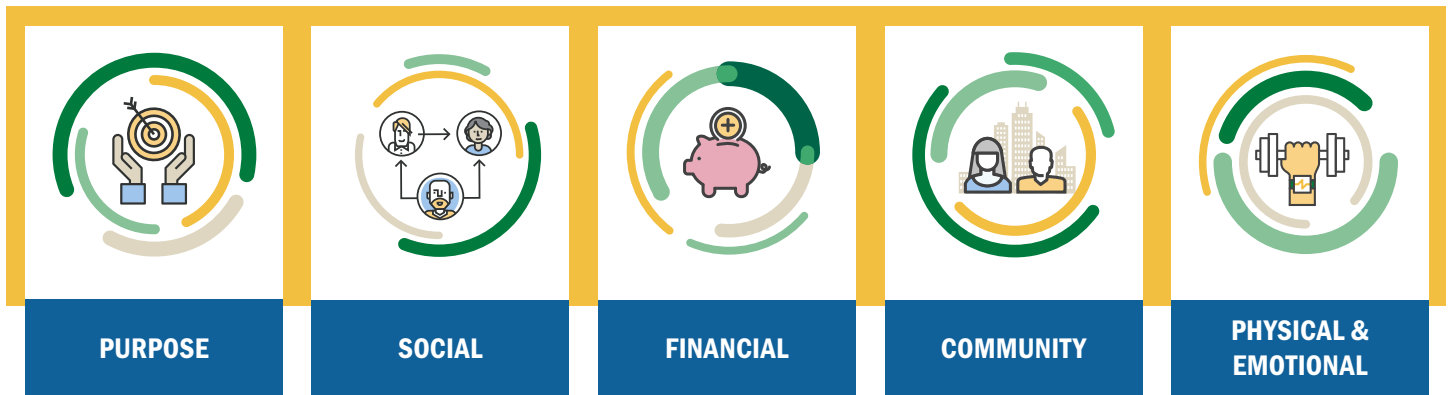


Janet Thompson
50 Women Leaders of Kansas
Women We Admire

APPENDIX D

EMPLOYEE BENEFITS PROGRAM

CBIZ Employee Benefits Program



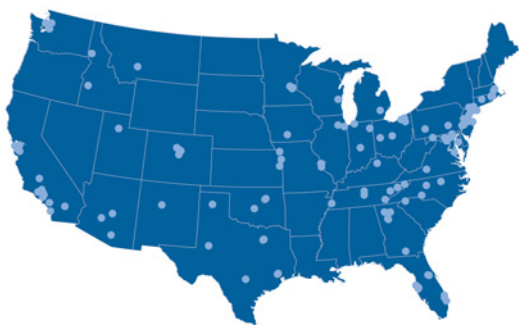
- PURPOSE**
- 529 Plan
 - Education Assistance Program
 - Employee Assistance Program
 - Service Anniversary Program

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

- 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

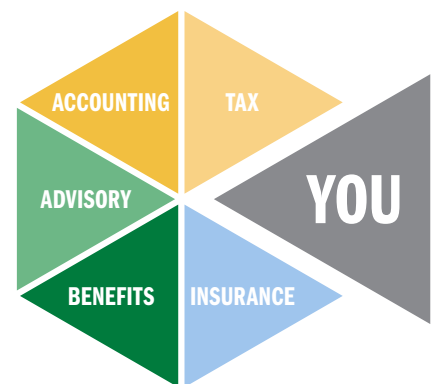
- PHYSICAL & EMOTIONAL**
- Medical
 - Pharmacy
 - Rx Savings Solutions
 - WellRight Program
 - Dental
 - Vision
 - Discount Vision Plan
 - CBIZ Benefits Portal
 - Personalized Health & Benefits Support
 - Virtual Care
 - Second Opinion



120+ offices
6,700+ team members
100,000+ clients

100 workplace awards in 2023

OUR SERVICES



FIND YOUR PERFECT FIT

CBIZ Employee Benefits Program



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: 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.

Continued on next page

CBIZ Employee Benefits Program (cont.)



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

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 in 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.

TEAM MEMBER RELIEF FUND: Assists full-time team members experiencing unexpected natural disasters or hardships. The fund supports team members with tax-free monetary grants and will be funded by tax-deductible donations made by participating CBIZ team members.



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.

Continued on next page

CBIZ Employee Benefits Program (cont.)



Effectively managing your economic life to reduce stress and increase security

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.



Your sense of engagement and involvement 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.

CBIZ Employee Benefits Program (cont.)



Fostering good health and mental energy to accomplish daily tasks

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 nationwide network of providers.

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 & 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 2023
YEAR IN REVIEW**

2023

Year IN Review



STRONGER
Together



CBIZ
WOMEN'S
ADVANTAGE

STRONGER
Together

Year IN Review

We are stronger together!

A MESSAGE FROM LORI NOVICKIS, CWA NATIONAL LEADER



Lori Novickis
Director,
Corporate Relations

“Alone we can do
so little; together
we can do so much.”

- Helen Keller

Sixteen years! For 16 years, we've been supporting, serving and developing women in the workplace and in our communities. And every year, we are reminded that we truly are stronger together.

In 2023, we continued to unite CBIZ team members by fostering connections and collaboration, building trust, making space for growth, nurturing mutually beneficial relationships and paving the way for the next generation.

The stories we share in this publication are a testament to the exceptional leadership, respect and partnership among our team members.

- Innovative and dedicated are two qualities exemplified by so many of our CBIZ professionals. We spotlight two of these women who lead in their own unique way and have made positive impacts on those they work with and those they serve. (pages 3 & 7)
- For the third year, the Women Transforming Business Awards recognized fearless leaders who span industries, geographies and roles, in the categories of financial strength, culture, innovation, community impact and, new this year, emerging leadership. (page 5)

- Once again, we broke our prior year's record by raising more than \$120,000 for 40 Dress for Success affiliates nationwide through our employee giving campaign. (page 9)
- Through connections facilitated by CBIZ Women's Advantage educational and networking programs, we help drive business growth. We share a testimonial from one of our managing directors. (page 8)
- The incredible women of CBIZ play vital roles and are highly regarded in the business and philanthropic communities across the country, as evidenced by countless awards, media mentions and board appointments. (pages 14, 15 & 16)

I'd like to thank our CBIZ Women's Advantage Executive Board members and alumnae, as well as the CBIZ team members and external supporters who contributed to our mutual success. Together, we go confidently into 2024 ready to unlock additional opportunities for innovation and sustained growth.

Thank you to the 2023 CWA Year in Review Editorial Committee:

- Laura Osvald, Karli Pryor, Lisa Rice, Marisa Scullin

SPOTLIGHT on



Veronica Quintana **CHAMPION FOR CHANGE:** Client-Centric Diversity & Inclusion

In January 2023, CBIZ took another step in advancing inclusivity and client-centric service with the launch of the Latino-Owned Business Service Team, spearheaded by Veronica Quintana, CBIZ Director, Tax. Veronica's leadership and dedication to building a team of bilingual professionals has opened doors for CBIZ and is a testament to our company's commitment to diversity and our clients.

Veronica's journey is driven by a powerful inspiration: her experience of seeing Latino entrepreneurs struggle with the language hurdle, followed by the elusive search for appropriate financing and qualified financial advisors. The Latino-Owned Business Service Team helps to remove those hurdles by bringing together bilingual, Spanish-speaking professionals across CBIZ to better serve Hispanic and Latino clients. She believes this initiative is "an opportunity to tell our clients that we see you, we care about you. and we support you."

Insights & Learnings Along the Way

An example of the clear need for the Latino-Owned Business Service Team was a meeting Veronica had with a produce client involved in real estate and rental properties. Communicating with him in Spanish opened new doors for assistance, including tax

preparation and planning for his businesses, as well as tax consulting, individual tax preparation, monthly reconciliation of financial statements and business advisory services. Veronica also advised the client on his companies' Employee Retention Tax Credit (ERTC) and a cost segregation study for his real estate acquisitions.

In June 2023, Veronica attended the Kreston Latin America Conference in Peru – an experience she describes as "memorable, meaningful and impactful." With her leadership style rooted in teamwork and a measured approach to growth, this international networking event was the perfect opportunity to identify ways to collaborate and partner with professionals across borders, expanding the reach of CBIZ's services.

Veronica passionately believes in the strength of women working together. She underscores the idea that "your success is my success," emphasizing the power of cooperation and networking. Her career exemplifies the potential for success when like-minded individuals share common goals. Her advice to aspiring women leaders is to build a supportive network, citing the invaluable support she received from colleagues like Sheree Harrison, CBIZ West Region Marketing Director, an advocate of the initiative.

Even with her busy professional schedule, Veronica maintains a non-negotiable commitment to family time. She prioritizes daily communication and quality time with her children, embodying the importance of work-life balance.

A Beacon of Innovation, Diversity & Inclusion

Veronica's leadership at CBIZ stands as a beacon of innovation, diversity and inclusivity. Her journey from idea to execution of the Latino-Owned Business Service Team reflects the power of visionary leadership, strategic collaboration and a commitment to empowering others. As CBIZ continues to expand its reach, Veronica's story serves as an inspiring example for women aiming to lead and launch initiatives in the corporate world.

Learn more about our Latino-Owned Business Service Team. [English](#). [Spanish](#).

CBIZ Women's Advantage
congratulates Veronica on
being named a 2023 **"Change
Maker"** award winner by our
CBIZ BIPOC (Black, Indigenous,
People of Color) ERG!

2023 CWA ALLY

Congratulations to Mike Schmidt, our 2023 Ally!

The CBIZ Women's Advantage Executive Board believes it's important to recognize our male colleagues who support CWA's mission by actively and routinely promoting CWA internally and externally.

This recognition highlights the fact that the support of our male colleagues is critical to our mutual success, inspiring others and making CBIZ a more inclusive organization. Nominees were considered based on their support of CWA and women in leadership, as well as their impact on team members, clients and the CBIZ culture.

Please join us in congratulating and thanking Mike Schmidt, our 2023 CBIZ Women's Advantage Ally!

- Mike tailors his management style to each individual, positively impacting team members' careers and their longevity at CBIZ.

“Mike makes me want to be a better professional. He's instilled a great culture of support and caring.”

2023 CWA Ally Finalist	2023 CWA Ally	2023 CWA Ally Finalist
		
Phil Zaman	Mike Schmidt	Todd Gordon
National Learning & Development Director Kansas City, MO	Managing Director Bellevue, WA	Lead Managing Director, Attest Practice Leader Salt Lake City, UT

- He believes having representation of women in senior leadership is paramount and encourages his team to look up to local and national women leaders.
- Mike works hard to ensure the work environment and our culture is inclusive, diverse, flexible and fair.
- He's responsive to the unique issues women face in the workplace.

In response to his recognition, Mike stated, "I'm taken aback by what my team and peers had to

say about me and how I support them. It really means a lot to me. It's probably the nicest thing anyone's said about me in my 25-year career."

“Mike is a fierce advocate for the women in our office and overall organization.”

We also want to send a huge thank you to our two finalists, **Phil Zaman** and **Todd Gordon**.

What is CBIZ Women's Advantage?

We spoke with members of CWA's Executive Board, inviting them to share the significance of CWA in their lives — personally and professionally. Their responses highlight the profound influence of CWA on various aspects, such as professional growth, philanthropy, networking and business development.

Check out this brief video for a deeper dive into the transformative impact of CBIZ Women's Advantage.



FEARLESS LEADERS

Inspiring Excellence

3rd Annual Women Transforming Business Awards

Powered by CBIZ Women's Advantage

At the heart of CWA's mission is celebrating women innovators who make an impact in their organization and community. Recognizing these inspirational leaders is the foundation of the annual Women Transforming Business Awards. Each of the businesswomen nominated overcame challenges and created a workplace that celebrates excellence, embraces authenticity and impactfully motivates.

In its third year, the Women Transforming Business Awards committee received over 250 nominations. While our 2023 finalists span different ages, industries, geographies and roles, they're united in a dedication to their people, organizational success and a thriving culture, as well as an unrelenting commitment to mentoring the next generation of leadership. CBIZ and CWA are proud to be champions of these leaders. The winners and finalists for the 2023 Women Transforming Business Award class are:

FINANCIAL STRENGTH



■ **Tassie Oswald, Partner, Eureka Equity Partners***

With rising interest rates and extreme tightening of debt markets, Eureka was challenged to identify financing for two critical transactions in 2022. Tassie's resilience, tireless work ethic and tenacity uncovered financing for both transactions, securing her place as a principal.

■ **Jaime Simpson, Chief Operating Officer, NetStandard**

■ **Dominique Bernardo, Chief Executive Officer, The Children's Charity of the Delaware Valley**

INNOVATION



■ **Kelly Aronson, Chief Information Officer & Senior Vice President, Anderson Corporation***

A driving force for increased collaboration between IT and business functions, Kelly's solution-oriented approach completely changed the value proposition for Andersen. She built creative, elegant solutions, driving cost savings of over \$3 million annually and increasing web traffic by 80% and sales leads by 60%.

■ **Amy Castillo, Chief Executive Officer & Executive Director, Ability KC**

■ **Ramona Hood, President & Chief Executive Officer, FedEx Custom Critical**

CULTURE



■ **Cynthia DiBartolo, Chief Executive Officer & Founder, Tigress Financial Partners***

Cynthia founded Tigress, the nation's first and only disabled- and woman-owned financial services firm. She is unconditionally mission-driven, with 80% of her team comprised of women and minorities who identify as African American, Asian, Hispanic or people with disabilities.

■ **Alicia Calero, Regulatory Compliance Manager, Avangrid**

■ **Tammy Peterman, President, The University of Kansas Health Systems, Kansas City Division**

COMMUNITY IMPACT



■ **Lisa Holland, President & Chief Executive Officer, Sheltair***

Lisa is committed to attracting a pipeline of women and girls to the aviation industry. She has donated innumerable hours and contributions to organizations such as Future Takes Flight Scholarship Program, Girls Achieving Leadership in Aviation, I Hart Flying and National Girls in Aviation Day.

■ **Mary Grove, Managing Director, Bread & Butter Ventures**

■ **LaTasha Powell, President & Co-Founder, Appetite for Change**

*Category winner

FEARLESS LEADERS Inspiring Excellence (continued)



Tampa Bay watch party



Philadelphia nominee reception



Cleveland watch party



Behind the scenes, in studio



Minneapolis nominee reception

2023 Women Transforming Business Awards Committee:

- Stefania DeMarco, Sara Ferden, Natalie Jackson, Sheree Harrison, Laura Osvald, Janet Thompson, Caitlin Waters, Ellen Wisbar

Find out more about the awards and our 2024 program [here](#).

SPOTLIGHT on



Alexis Hankerson-Tolbert

A Journey of Recognition, Reflection & Empowerment

It's a typical day for Alexis Hankerson-Tolbert, CBIZ Property & Casualty Account Executive in Atlanta. She hops on a call, ready to dive into a new business opportunity. As the meeting begins, she's stunned to see CEO Jerry Grisko looking back at her. Alexis, always the professional, contains her excitement, composes herself and prepares to talk business. However, Jerry has a different agenda; he's there to share that Alexis is the recipient of the esteemed 2022 Steve L. Gerard Legacy (SLG) Award. For just a moment, time stands still for Alexis.

"My first reaction was to cry," Alexis said. "It was such a humbling moment, and I felt so honored. I had to stop for a second and take it all in."

Alexis had seen her name on the list of nominees from across the country. While flattered by her peer recognition, she never thought she'd win. "When I got that call, I thought about all the people on the list who are high up, making big moves and doing big things in our industry and company," Alexis said. "It goes to show that when you bring your best to work at any level, people take notice of the impact you make."

Leveraging Recognition for Growth

Having been with CBIZ for just under a year, Alexis leveraged this significant accomplishment to become an even more valuable team player. The recognition inspired her to join CBIZ Women's Advantage — a move driven by the desire to continue evolving and inspiring others. "After receiving the award, I didn't change anything about who I am because I feel like that's enough, but it challenged me to focus more on education," Alexis said.

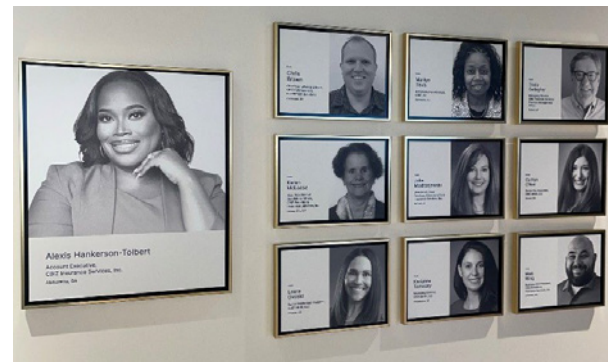
While winning the SLG Award helped Alexis realize the impact she has on her community, CBIZ Women's Advantage has allowed her to help CBIZ women put their best foot forward, enabling success and longevity. Connecting with women across the organization has also inspired her to reflect on how she shows up to work daily.

"This group has been such a blessing for me," Alexis said. "It's taught me a lot about work-life balance. I feel empowered to implement changes that ensure I'm successful at my job and at home. CWA also pairs you with someone who helps you to be accountable for bringing your best self to work."

A Legacy of an Open Door

Alexis's open-door policy, which helps to create an environment where all can thrive, has become a hallmark of her career. She serves as a guiding light, demonstrating that each individual's dedication contributes to the success of the entire organization, and embodies the company's "We are OneCBIZ" value.

Alexis's journey at CBIZ is a testament to the power of recognition, reflection and empowerment, encouraging all to bring their best selves to work and make a difference. She imparts this critical piece of advice: "You really have to care. Care about what you do and the people you work with."



Steven L. Gerard Legacy Award Winner & Finalist Wall, Corporate HQ

Driving Business Growth



Through CWA's educational and other programming, we help women develop strong referral networks, identify business opportunities and drive revenue growth. Tiffany Garcia, Managing Director, CBIZ Risk & Advisory Services, shares how CWA has helped grow her business.

If you asked me: "What is the most impactful decision you've made at CBIZ?" I'd answer, without hesitation, "getting involved with CWA programs, committees and, ultimately, joining the Executive Board." The growth of my personal, professional and business development skills during Spark and Ignite was instrumental in enhancing my confidence and self-awareness in these areas. Additionally, the amazing women I bonded and grew with over the year-long sessions have become a strong and diverse network of dependable, extraordinary colleagues.

The key to success in our business is relationships, and the meaningful connections made through CWA – internally and externally – have substantially contributed to practice and revenue growth. Having this trusted and capable extended team, looking for opportunities to market and support me within CBIZ and in the community, is invaluable and humbling. They constantly motivate me to excel and pay it forward to other exceptional women.

Congratulations & Gratitude to Karen Grasso

Retired CWA Executive Board Member

CWA extends our heartfelt congratulations to Karen Grasso, former Executive Board member, on her retirement. We are grateful for her instrumental role in making CBIZ Women's Advantage the success it is today.

We'd also like to congratulate Karen on being a contributor to "The Sixth Level," which proposes an impactful leadership model rooted in the ethics of care. Her contribution includes commentary on the impact CWA had on her and her ability to lead during her 24 years at CBIZ. In line with the goals of CWA, the book provides a practical guide for aspiring leaders eager to shape a brighter future.



[Find out more about the book here.](#)

Women to Watch

CBIZ employees had the opportunity to nominate their colleagues for special recognition as Women to Watch, based on their accomplishments, dedication and contributions to our workplace. These extraordinary women have been acknowledged in four categories: Leadership and Employee Development; Client Growth and Retention; Operational Excellence; and Community and Cultural Impact.

Please join us in congratulating the 228 remarkable honorees who have played a pivotal role in shaping CBIZ's success.

A full list of the nominees with short accounts of their dedication and achievements can be found in our [2023 Women to Watch publication](#).



PHILANTHROPY IN ACTION

Breaking Records for Dress for Success



2023 marked CWA's 16th year of partnering with Dress for Success (DFS), a global charitable organization that empowers women to achieve economic independence by providing a network of support, professional attire and development tools. DFS has served more than 1.3 million women globally, thanks to the financial support of partners like CBIZ.

CBIZ continues to achieve record-breaking results with an approximately 20% increase in each of the last two years!

CWA x Dress for Success Partnership by the Numbers:



Connections for Success' Annual Tribute to Success

CWA Kansas City is a dedicated partner of Connections to Success – a nonprofit that empowers families to realize their dreams and attain economic independence. Dress for Success is one of their key programs. CWA was again a proud sponsor of their Tribute to Success Kansas City Celebration. Thank you to our representatives: Emily Buenger, Alex Lanning, Amanda Newell, Pam Reeder, Janet Thompson and Caitlin Waters.

This year, through our “Your Hour, Her Power” campaign, CBIZ employees across the country raised \$120,000.

 [Watch the check presentation here.](#)

“Thank you for being committed to us. Thank you for your engagement with us and the partnership. It is your time, talent and treasure that allows all the affiliates you supported to do what they do in service of the women we serve every single day. We literally couldn't do it without you.”

- Michele Meyer-Shipp, Chief Executive Officer, Dress for Success Worldwide

Dress for Success Co-chairs:

- Sherry Burick
- Heather Hernandez

Little Black Dress Memphis

Our Memphis team sponsored tables at the Dress for Success Little Black Dress event. Guests enjoyed a fashion show, live music, comedy show and silent auction.



Build Your Own Bouquet Flower Bar

The New England Community Outreach Committee organized a three-day flower sale to generate funds for Dress for Success. Partnering with two local, small business florists, the initiative raised \$1,380.

CBIZ WOMEN'S ADVANTAGE in Our Communities

Sip & Style

New York's sip and style event featured insights from Kendra Porter, TEDx speaker, image consultant and professor, on communicating through style, color psychology and more. The team also celebrated its commitment to Dress for Success and the "Your Hour, Her Power" initiative.

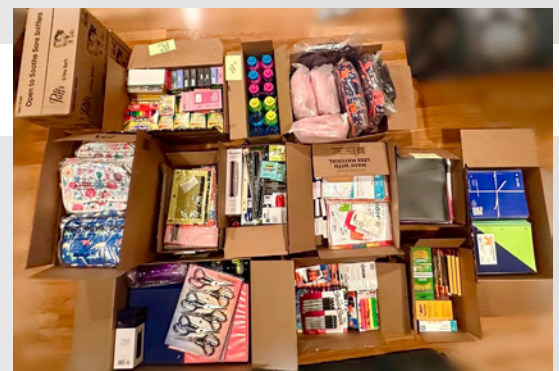


Celebrating International Women's Day

Our Boca Raton team celebrated International Women's Day on March 8. They're pictured here holding powerful messages. #EmbraceEquality

Providence Public Schools Supplies Drive

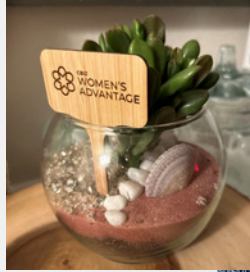
Our New England team partnered with our CBIZ Pride Employee Resource Group for a school supplies drive. Together, they collected over 1,500 items.



CBIZ WOMEN'S ADVANTAGE in Our Communities (continued)

Greening Spaces: Build Your Own Terrarium

At this Phoenix networking event, guests built their own custom terrarium to enhance their homes and offices. With expert guidance through each step, even those without green thumbs found success.



Must-Know Economic Trends for the Revenue Generator

Anna Rathbun, Chief Investment Officer, Retirement & Investment Solutions, delivered a presentation at a collaborative CWA and WIRED event, shedding light on the dynamics of credit markets and the implications for business leaders. Additionally, the Minneapolis team spearheaded a donation drive for WomenVenture, a client dedicated to linking women- and minority-owned businesses with capital and training to foster success.

Chocolate + Wine Therapist

The Colorado team organized a delightful chocolate and wine (or tea) pairing gathering in collaboration with The Chocolate Therapist. Attendees learned about the chocolate-making process and proper pairing and tasting techniques.



LAYING THE FOUNDATION for Fearless Leadership

CBIZ Women's Advantage helps create a competitive advantage for our women through professional training, development, mentorship, recognition and career enhancement opportunities.

Personal & Professional Growth Series

Through intimate groups, CWA's Growth Series focuses on personal and professional development. Meeting several times throughout the year, the sessions include opportunities for networking, facilitating and presenting.

Early- and mid-career professionals are encouraged to join Spark: Personal Growth Series, which focuses on skills to help women navigate their careers, build their brand, strengthen competencies and create relationships. Ignite: Professional Growth Series is designed to help women develop skills to build and enhance their client-based relationships, external network and business development. Additionally, all participants receive volunteer growth opportunities as a Professional Advantage Leader or future series leader.

Since its inception,
more than
1,600
CBIZ professionals
have participated
in these series.

Enlighten Book Clubs



Research shows that reading reduces stress, increases the ability to focus and can be motivational. It's also been shown that book discussion increases retention by 70%. As a key professional development opportunity, all CBIZ professionals are encouraged to participate in our Enlighten Book Clubs. Participants engage in multiple meetings annually, with the goals of improving relationships, stimulating powerful conversation, investing in personal and professional development, and challenging assumptions.

Launched in
2013, there have
been 122 clubs
with more than
1,400
participants.

MasterClass Series

CBIZ MasterClass was created to educate, inspire and promote growth in leadership competencies among all CBIZ team members. The live sessions are recorded and placed in an internal training library for ongoing access. Each MasterClass is an interactive interview with CBIZ leaders focused on inspirational content. 2023 sessions included Building Your Brand, Thriving in Periods of Change, Managing Yourself and Others With Integrity, and Taking Risks.

More than
1,200
CBIZ team members
tuned in for the 2023 live
sessions, and more than
3,300
have attended since
MasterClasses began
in 2020.

OUR IMPACT ON Acquisitions

Energizing Women in the Corporate Landscape



In the dynamic realm of business acquisitions, integration is pivotal to success. CBIZ Women's Advantage helps foster a sense of connection and inclusion among women team members during this critical time. Here's how:

Connecting Women to the Larger CBIZ Community

One of the standout features of CWA is its ability to help women feel part of the larger CBIZ community in the early stages. This connection is more than just a professional network; it's a support system that facilitates a smoother transition into the newly formed organization. By providing a sense of belonging, women team members are empowered to navigate the integration with confidence.

Cross-Business Unit & Service Line Connections

The program goes beyond the boundaries of individual business units and service lines, actively linking women across CBIZ. This network serves as a platform for education, offering insights into the diverse array of services we provide. Through personal interactions, women team

members gain a deeper understanding of the organization and how their roles contribute to the broader CBIZ landscape.

Fostering Inclusivity for Talent Retention

Inclusivity is not just a corporate buzzword here; it's a strategic imperative, especially during the integration of acquisitions. CWA recognizes its significance in employee satisfaction and talent retention. When women feel supported, they're more likely to remain engaged and be invested.

Professional Development Programs

CWA offers numerous educational programs for our women, including our Spark and Ignite professional development series. Congratulations to the 30 Spark graduates from our recently acquired firms:

- CBIZ Bernston Porter
- CBIZ Marks Paneth
- CBIZ Somerset
- CBIZ Stinnett

2023 AWARD RECOGNITION

CBIZ celebrates our professionals who were honored in 2023.

Melissa Black

**Top Women Advisors:
Rising Stars**

*National Association of Plan
Advisors (NAPA)*
Winner



Tami Bolder

2023 Power of Change
The Ohio Society of CPAs
Honoree



Cheryl Calhoun

Women of Influence: Accounting 2023

Los Angeles Business Journal
Winner

Top 100 Accountants

Winner

Minority of Influence: CPAs

Winner

**Women's Leadership Awards: Community
Impact Advocate**

Honoree

Jennifer Gage

**Top Women Advisors: All
Stars**

*National Association of Plan
Advisors (NAPA)*
Winner



Sheree Harrison

**Diversity, Equity & Inclusion
Champions**

Los Angeles Business Journal
Recognition



Heather Hernandez

**Top 50 Women of Influence
in Accounting & Finance**

San Diego Business Journal
Honoree



Betty Liu

**Women of Influence:
Accounting 2023**

Los Angeles Business Journal
Honoree



Veronica Quintana

Top Women in Business

*Pacific Coast Business
Times*

Honoree | Editor's Choice



Erin Ricardez

**Diversity, Equity & Inclusion
Champions**

Los Angeles Business Journal
Recognition



Rachel Roberts

**2023 Everyday Heroes
& Heroines**

Colorado Society of CPAs
Winner



Jing Shen

Thriving in Their 40s

Los Angeles Business Journal
Winner



Top 100 Accountants

Los Angeles Business Journal
Winner

Melinda Stinnett

Outstanding Entrepreneur

*University of Tulsa's Collins
College of Business*
Hall of Fame Inductee



Janet Thompson

**50 Women Leaders
of Kansas**

Women We Admire
Honoree



EXCEPTIONAL LEADER AWARD WINNER



Katie Carrothers

Vice President of Recruiting

Congratulations to Katie Carrothers for being named the Exceptional Leader Award winner in the category of Leader of a Large Early Career Program by the Campus Recruiting Choice Awards! Katie is responsible for leading a team of 12 campus recruiting professionals who recruit for all CBIZ service lines.

TOP 50 WOMEN IN BUSINESS



Dana Marti

Congratulations to Dana Marti, CBIZ Long Island, who was honored by *Long Island Business News* as one of their Top 50 Women in Business. This exceptional program celebrates some of the brightest women professionals on the island who excel in business, serve as mentors and make a positive impact in the community.

CWA WOMEN IN THE NEWS

Joanna Powell

U.S. News & World Report

4 Benefits of Filing Taxes Early (Feb. 9)

Stefania DeMarco

Pennsylvania Institute of Certified Public Accountants (PICPA)

Team Motivation during Accounting Busy Season (Feb. 15)

Michelle Brown

U.S. News & World Report

Everything You Need to Know About Claiming a Mileage Tax Deduction (March 21)

Veronica Quintana

Hispanic Executive

Living Gratitude Every Day (May 31)

Jennifer Leelaviwatana

Financial Advisor Magazine

Volatile Markets a Key Consideration for Midyear Tax Planning (June 19)

Stefania DeMarco

Pennsylvania Institute of Certified Public Accountants (PICPA)

The Adventure of Navigating a Slow-Growth Economy with Agility and Excellence (Aug. 17)

Megan Murdock

Employee Benefit News

Own your progress: Tips for navigating mid-year reviews with confidence (Aug. 17)

Melinda Stinnett

Strategic CFO 360

Think Twice About Slowing Down on ESG (Sept. 18)

Courtney Vitale

CFMA Building Profits Online

Diversity, Equity & Inclusion: A Concept for All (Nov. 6)



Carrie Gizienski

Providence Business News

Flap over ERC claims puts strain on firms (Nov. 10)

Naomi Ganoe

U.S. News & World Report

Are Brokerage Accounts Taxed? (Nov. 20)

Katherine Zheng

The New York State Society of CPAs, NextGen Magazine

From China to Firm Leader & Community Advocate (Winter '23)

Michele Lazzara

Financial Advisor

Prepare Clients for the Return of the Alternative Minimum Tax (Dec. 11)

Veronica Quintana

Inside Public Accounting

Empowering Latino-Owned Businesses a Personal Quest (Dec. '23)

Veronica Quintana

Accounting Today

Practice Profile: Speaking their Language (Dec. 27)

Anna Rathbun, Chief Investment Officer, Retirement & Investment Solutions, was featured or cited in over 50 interviews, articles and more in national and local media outlets, including ***The Wall Street Journal***, ***Reuters***, ***CNBC***, ***Bloomberg*** and ***U.S. News & World Report***, among many others.

[Check out a variety of insights from our highly sought-after team member here.](#)

CBIZ WOMEN'S ADVANTAGE

Executive Board Members



- Tami Bolder**, Akron
- Sherry Burick**, Winston Salem
- Dana Burton**, Tampa Bay*
- Stefania DeMarco**, Philadelphia
- Sara Ferden**, Minneapolis
- Tiffany Garcia**, Austin
- Heather Hernandez**, San Diego
- Jennifer Harris**, Bakersfield
- Sheree Harrison**, San Diego
- Sarah Jackson**, Denver*
- Catherine Latham**, Boston*
- Nancy Mellard**, Kansas City
- Deepa Menon**, Dallas
- Liz Mueller**, New York
- Megan Murdock**, Memphis*
- Elizabeth Newman**, Cleveland
- Lori Novickis**, Cleveland
- Laura Osvald**, Denver & Phoenix
- Ashleigh Perez**, Denver*
- Kim Randolph**, Boca Raton
- Caitlin Waters**, Kansas City*
- Holly Weaver**, Cleveland*
- Ellen Wisbar**, Cleveland*

*Not pictured in group photo

CBIZ Women Elected to Boards in 2023

Emily Aberle	Backpack Society
Cathy Anthony	Clarity Benefit Solutions
Ivette Canjura	Riverwatch Condominiums Assoc. & South Mountain Conservancy
Kathleen Cooke	Women's Energy Network
Alex Elliott	Young President's Organization (YPO), Kansas City Chapter
Melinda Hallinan	Creek Village Homeowners Association
Melissa Henry	Camelot Community Care
Nancy Mellard	Association of Professional Insurance Women Board of Directors (APIW) & USLAW Labor and Employment Practice Group Client Advisor
Lorna Mouton Riff	Tulsa Chapter Association of Talent Development (ATD)
Kathy Mills	Sarasota Collaborative Family Law Professionals (SCFLP)
Veronica Quintana	Health Care Foundation for Ventura County & American Lung Association, Audit & Risk Oversight Committee
Jennifer Roberson	Tulsa Chapter Association of Talent Development (ATD)
Michele Robinson	Richmond Family YMCA
Connie Tritt	Rotary International
Karianne Tomosky	Construction Financial Management Association (CFMA) Philadelphia Chapter
Catherine Wilhelm	Tampa Bay Wave
Rachel Winkler	Kids TLC, Inc.

APPENDIX F

**SUSTAINABILITY
POLICY**

SUSTAINABILITY, ENVIRONMENTAL RESPONSIBILITY, AND CLIMATE CHANGE POLICY

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

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

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

- We are committed to “reduce, reuse, and recycle” programs at our offices. We will

endeavor to reduce the use of, and promote recycling of, commodities such as paper, metals (e.g. aluminum) and plastic products.

- We will operate in an environmentally responsible manner and in compliance with environmental laws and regulations.
 - We will make environmental responsibility and resource conservation an integral part of business management and will support finding meaningful solutions to environmental concerns that may arise.
 - We will reduce our impact on the environment through local operations’ initiatives.
 - We will work to reduce the company’s carbon footprint, where possible, and to promote sustainable consumption.
 - We will continue to promote our shift from print-based marketing and promotional materials to digital assets to help conserve natural resources.
 - We will continue to utilize video conference meetings when practical to reduce GHG emissions and other effects of air travel.
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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 team dedicated to information security and administration of our Information Security Management Policies. Our policies apply 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 8**.

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

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Workforce Diversity

Below are percentages for workforce diversity among our team members and board of directors for 2023. For more information on our diversity and inclusion efforts, please refer to **page 14** of this report.

Workforce by Gender	
Male	48%
Female	52%

Workforce by Race/Ethnicity	
White	79%
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%

(continued on page 65)

Workforce by Generation	
Gen Z	14%
Millennials	40%
Gen X	31%
Baby Boomer	15%
Traditionalists	<1%

Workforce Turnover	
Total	15.4%

Board of Directors by Gender	
Male	78%
Female	22%

Board of Directors by Race/Ethnicity	
White	78%
Black or African American	22%

Workforce Engagement

Our over 6,700 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 team member 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 helps to inform our efforts to retain, engage and develop our team members including learning and development, recognition and rewards, work environment, and diversity and inclusion. Throughout the year, we also conduct 'pulse' surveys on specific topics to gather timely feedback from our team.

During 2023, CBIZ was certified as a *Great Place to Work*, and received a record 100 national and local

workplace and health and wellness awards including being named a Top 100 Firm by *Accounting Today*, and a Best Place to Work In Insurance (for the ninth 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 team members 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.



Top: CBIZ Salt Lake City team members were gifted new CBIZ-branded sweatshirts.

Bottom: CBIZ Akron volunteered at the Akron-Canton Regional Food Bank.

Cover: CBIZ Tampa Bay helped build a house with Habitat for Humanity.



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