

I'm With U



USI's Diversity, Equity & Inclusion Program

Advancing Our Commitment to Diversity, Equity & Inclusion

At USI, we serve clients of all sizes, industries and geographies, with diverse demographics and backgrounds. Our clients have many dreams and goals they are pursuing, and we work with them to navigate the risks and challenges to help make those dreams a reality. We believe that diversity, in all its forms, makes us stronger. That's why in June 2020, we reaffirmed and formalized our dedication to this effort by establishing I'm With U, USI's official diversity, equity and inclusion (DEI) program.

Our collective success at USI relies on our ability to exercise three foundational skills in service to our clients, prospective clients and fellow team members.

- **Active Listening** – Listening to others to understand their perspective, views, where they are coming from, and what's important to them, especially when it's different from how we think and see things.
- **Connecting** – Demonstrating and acknowledging we've heard and understand, and forging a mutual connection and a path forward, together.
- **Fact-based Problem Solving** – Grounding what we do in the facts, as opposed to biases or assumptions, so that we can have a positive, measurable impact.

These foundational skills represent the essence of how we excel in serving clients and how we advance our commitment to an ever more diverse, equitable and inclusive environment at USI and beyond.



Areas of Impact

Through our I'm With U program, USI is focused upon making an impact in three key areas:

1. Our Clients & Prospective Clients

- USI is organized and focused through our proprietary OMNI platform to deploy our deep expertise matched to the diverse needs of our clients and prospective clients.
- All 8,000+ USI team members complete a foundational training and development curriculum to develop core relationship skillsets for best-serving clients.

2. Our People & Culture

- USI is focused on expanding diversity in all its forms and having that reflected in our own team members.
- We have gathered informational baselines and are increasing diversity, including gender, ethnicity and age, across all roles in our organization.
- Diversity is included as a core focus in the areas of hiring, mentoring, promotion and development.

3. Our Communities

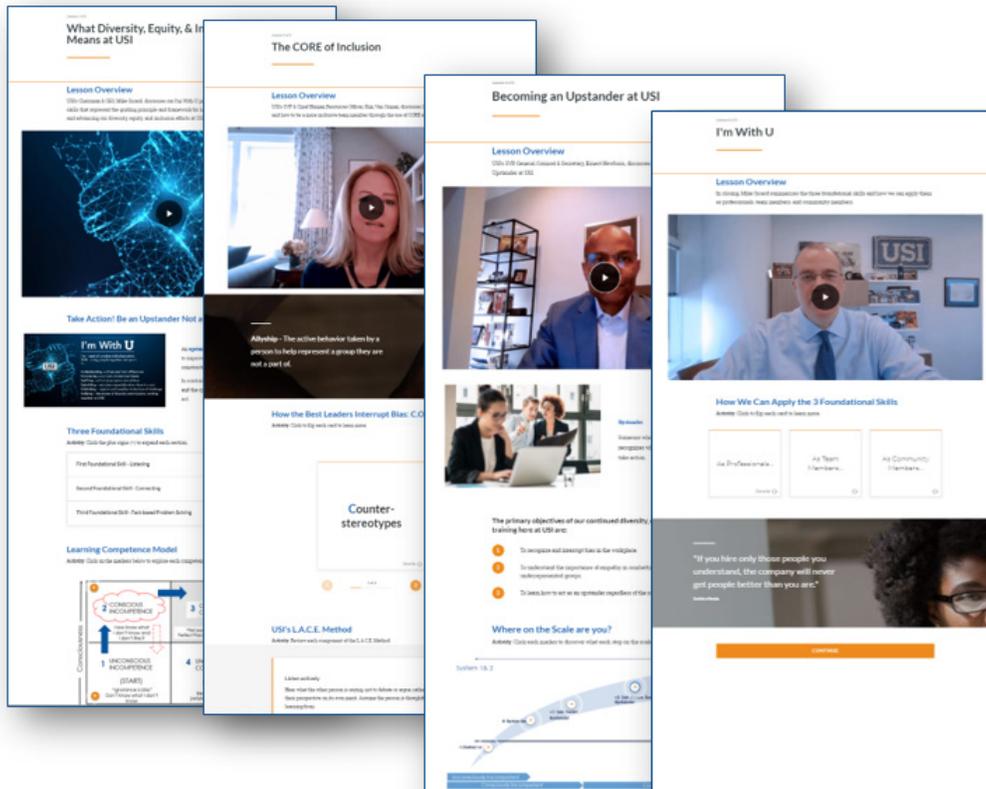
- At USI, we perform hands-on service and strive to support and advance marginalized communities.
- USI's annual award-winning service program, USI Gives Back, encourages local offices and employees to incorporate our I'm With U values when volunteering their time, talents, and resources to support underrepresented groups and the local communities we serve.

Engaging Our DEI Network

Over 500 USI employees have volunteered to help further USI's DEI priorities. To spearhead this effort and lead by example, we established an Executive Sponsor Team, a full-time DEI Manager, and a 20-member I'm With U Council. The council serves as advisors to our Executive Sponsor Team and is 85% diverse in its representation of race, ethnicity, religion, gender, sexual orientation, veteran and disability status, reflecting all levels of our organization. USI's Executive Sponsor Team, DEI Manager and council, represent a strong network of DEI advocates committed to championing a culture where diversity, equity and inclusion are foundational to our success.

Building an Organization for the Future

At USI, we strive to be a company of employees who represent the diversity of our prospects, clients and communities by upholding a professional environment that is inclusive and seeks out diversity of thought and background. We firmly believe that this is a movement toward a better world – not just a moment in time.



We look forward to advancing our efforts — working together as ONE — to build an increasingly diverse, inclusive, and equitable culture.

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