

# Diversity, Equity and Inclusion at Segal

2023 Report



Segal

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A photograph of a man with curly brown hair and a beard, wearing a grey sweater over a checkered shirt. He is smiling and looking towards the camera. In the background, other people are working at desks in a bright office with large windows. A purple text box is overlaid on the bottom left of the image.

### About This Report

The purpose of this report is to show, at a point in time, how Segal is working to support diversity, equity and inclusion (DEI).

The report includes activity and data through the end of 2023. It does not reflect changes that occurred between January 1, 2024 and when this report was published. That progress will be documented in a future report.

Where data was available to support it, we have noted trends from earlier years (e.g., hiring and promotion). We intend to produce this report each year — ideally with ever-richier sources of data — in order to provide increased insight into our progress over time.





## Message from David Blumenstein, President and CEO

Dear Segal colleagues,

Welcome to our 2023 DEI Report! This edition, our third annual report, gives an overview of the activities and progress we made during 2023 on our DEI journey.

Last year I emphasized the importance of our mission and values in laying a strong foundation for our DEI efforts, the historical roots of our commitment, and how our mission and values serve as ideals to which we must continually aspire. This year I want to focus on our Employee Value Proposition (EVP) — what Segal offers you — both because DEI is an essential part of the EVP and because the EVP, in turn, is central to our ability to continue to make progress on our DEI initiatives.

While our mission of delivering trusted advice that improves lives is focused on our clients, our EVP adds three very important words: “...including our own.” By taking our mission and applying it to ourselves, we are driving home our commitment to each of you. As a uniquely human company, we not only add value for our clients, we enrich our own lives as well.

Our EVP is directly connected to our commitment to DEI because it defines what we value about our relationship with you and how the company can empower you to do your best work every day. Accordingly, this year, we’ve organized our DEI Report around the three distinct, interconnected core components of our EVP:

**Career.** We offer opportunities for lifelong careers that enable you to make a positive impact on our clients today and tomorrow. We are proud of our deep expertise and the impact of our contributions. We design a rich learning environment where each of us is encouraged to pursue our interests and career ambitions, because when you grow, we all do.

**Culture.** As a mission-driven, client-focused, employee-owned and privately held 85-year-old firm, our unique workplace is focused on people — both our client’s and our own. We care for and support each other. We offer a flexible work environment that fosters agility and innovation. We are taking action to become more diverse, equitable and inclusive.

**Compensation.** We offer financial rewards that care for you now and in the future, including competitive cash compensation, health and wellness programs that promote and support a healthy lifestyle, and competitive retirement programs that reward tenure and loyalty.

By offering career opportunities to employees who have diverse backgrounds, having an inclusive culture that values each person, and providing compensation that’s fair and includes benefits that meet different needs, we ensure our EVP is compelling and strong.

Thank you for everything you do each day to make Segal a special place to work, including your contributions to DEI. I urge you to continue to make DEI a priority by participating in the many programs we offer, by helping in our recruiting and talent development and through your work with clients and in your communities. It is only through all of us working together that we will make progress and continue to bring our mission, vision and values into being.



President and CEO



## Segal's Commitment to DEI

At Segal, we're committed to DEI, which is one of our key strategic priorities and is woven into our mission, vision and values.

As part of that commitment, we:

- Strive to ensure that all employees are treated fairly and equitably and have the opportunity to advance without barriers.
- Offer a work culture and environment that embraces the uniqueness of all employees.
- Promote understanding and welcoming of each other's differences, including our diverse backgrounds and each employee's capabilities, to help us better serve clients.
- Embrace diversity as one of the six core values upon which we build long-term relationships with each other and our clients.
- Activate DEI as a key part of Strategy 2025 and our annual business plan.





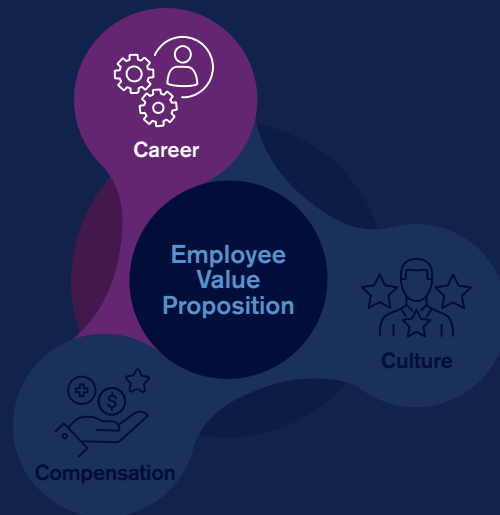
## Career

There is opportunity for everyone at Segal to learn and grow. Devoting Segal time and resources to career development is a critical investment and fosters a continuous learning culture to help people succeed.

As part of our Total Rewards initiative in 2023, we focused on improving career transparency and development for our employees. The objective is to improve the visibility of career opportunities across Segal and help employees engage in productive discussions with their managers about their careers.

Over the summer, we conducted education sessions to introduce:

- Segal's new Career Principles
- The refreshed Career Navigator
- Clarified expectations for employees and managers for career development



- We are proud of our deep expertise and the impact of our contributors.
- We offer a rich learning environment.
- We are a place where you can grow.
- Learning is a shared venture.
  - We offer robust training, stretch assignments and mentorships.
  - Each of us is encouraged to pursue our interests and career ambitions.





## Career Navigator updated

In June, we introduced Segal's refreshed and enhanced Career Navigator. It is now an interactive tool that provides additional visibility into careers at Segal. We held educational sessions for all employees covering the updates. During that training, colleagues who had transitioned into different career categories during their time at Segal shared their stories. These sessions set the stage for change, introduced the enhanced Navigator and discussed how it should be used across the organization.

The updates to the Career Navigator are intended to make the tool a reflection of our career principles, helping you and your manager to better understand how to enhance, grow and take charge of your career development.

Highlights of the updates include:

- First and foremost, it is now an interactive tool on SegalNet. In alignment with our "One Segal" philosophy, there is now one Career Navigator instead of four aligned career paths.
- Reorganized content sets additional expectations for DEI, business impact and management responsibilities. These updates provide more visibility into opportunities to move across and up the company, while building varied technical, business, management and leadership experiences and competencies.
- Descriptions of varied job families at Segal are groups of jobs that require similar training, skills and expertise and often provide career progression within a function (e.g., IT, HR, Marketing, Compensation & Career Consulting and retirement actuaries).
- Segal's job families are all described in the Career Navigator so that people can be more aware of different opportunities and functional areas of interest across Segal.
- We added new emphasis on skills, behaviors and competencies rather than on education and years of experience.

The Navigator was always intended to be a tool for ongoing career and development conversations and exploration, and the interactive tool and the reorganization make it easier to use.

We encourage you to explore the Career Navigator and use it to help guide career development and growth opportunity conversations with your manager.



## Career conversations

Career conversations are two-way exchanges that uncover more about an individual: their values, interests and strengths and how those may align with changing business needs. These conversations help you and your managers engage in an interactive dialogue about long-term career goals and opportunities across Segal.

Career conversations are foundational to all parts of the performance and talent cycle. If career goals aren't shared and understood, then performance expectations, development and rewards have no meaning beyond the "now."

Throughout the fall of 2023, we held more than 30 sessions on how career conversations work. These sessions were live and included breakout rooms for discussion on ways employees and managers can have meaningful conversations about how to match career goals and company priorities.

Career conversations can be complex. The framework we introduced is a guide for having productive career conversations over the course of time, not just once a year. The education covered:

**Look inward** to enhance your self-awareness of your own values, interests and strengths.

**Look outward** to expand your knowledge of the HR and benefits industry, including trends, key developments and innovations.

**Look forward** to envision future success for yourself.

The training will be offered on an ongoing basis to new employees and we expect career conversations to become deeply imbedded in the way we work together as managers and colleagues.



## Mentorship Program

Our Mentorship Program, which began in 2019, is a key aspect of DEI at Segal. We encourage all employees to consider participating in mentoring, either as a mentor and/or a mentee.

As part of the guidelines for mentoring, we emphasize that everyone involved should not only gain an awareness of diverse perspectives but that mentors should be bridges to enable their mentees to access opportunities, resources and support.

The Mentorship Committee develops and delivers the programming, does the confidential matching of mentors and mentees, and encourages participation throughout the organization.

Interest in the Mentorship Program has grown. When the program began, there were 47 pairs. During 2023, 274 employees (159 pairs) participated. Over the past five years, the growth rate was 238 percent!

Mentors and mentees connect with each other, regardless of where they are geographically. And as a result, participants expand their internal networks.

Mentees decide to participate in the Mentorship Program for career development, to improve their leadership skills and to learn.

Both mentees and mentors said the program broadened their perspectives.

Here's the positive response we received from participants in the 2023 mentorship program:

- 98 percent rated the program as either valuable or extremely valuable.
- 94 percent said they intended to participate again in 2024.
- 97 percent of mentees said the program enhanced their development.
- 100 percent would recommend the program to a colleague.

Over 700 employees have participated in the Mentorship Program since its inception, sometimes as a mentor and a mentee in the same year.

Learn more about our Mentorship Program on SegalNet.



**24% of employees participated in the 2023 Mentorship Program.**

### Mentorship Committee

**David Brenner**

Senior Vice President, National Multiemployer Market Director

**Jenny Chan**

Vice President, Benefits Consultant

**Dan Ciner**

Senior Vice President & Actuary

**Amy Cohen**

Vice President & Actuary

**Sunday Coulter**

Vice President, Design & Brand Management Leader, Marketing

**Sasha Dalziel**

Vice President & Health Consultant

**Matthew Martinez**

Actuary

**Danielle O'Hare**

Vice President, Human Resources

**Angela Purdum**

Vice President, Communications/Segal Benz

**Jill Whiteman**

Vice President & Manager, Health Benefits





**Celerie White**

Vice President,  
Communications/  
Segal Benz  
Logan's Mentor

// I was honored to participate in Segal's Mentorship Program and be a mentor to Logan. I was very impressed by him — a newly hired colleague. He was enthusiastic about his career at Segal and the opportunities to pursue his interests and career ambitions. That's one of the reasons I find working here a unique experience. Segal offers a learning environment where colleagues have access to other colleagues who are willing to be advocates, which is an important part of being an employer of choice. I find such advocates show they really care about you, your development and your potential."

// Segal's Mentorship Program has helped me feel more comfortable, confident and prepared to have open and honest conversations about my career development. Using internal expertise, Segal is providing an invaluable coaching service to any employee that wishes to participate. I'm thrilled to be part of an organization helping me learn and grow every day!"



**Logan Jeffers**

Financial Systems Senior  
Analyst, Financial Services  
Celerie's Mentee





## Next Committee

**Amanda Baker** (Co-Chair)

Actuary

**Jake Karmel** (Co-Chair)

Vice President, Benefits Consultant

**Jenersy Aristil\***

Consultant, Retirement

**Alex Borucki\***

Senior Consultant, Administration  
& Technology Consulting

**Kim Cunningham\***

Manager, Learning and Development

**Geneviève Lussier** (Sponsor)

Vice President, Retirement Practice  
Leader – Canada

**Debbie Onimole-Brown**

Associate Consultant, Compliance

**Kerri Donald Sears** (Leadership Sponsor)

Senior Vice President, Human Resources

**Matthew Thies**

Senior Consultant, Segal Marco Advisors

**Vanessa Vargas** (Sponsor)

Vice President, Segal Marco Advisors

**Johnny Wu**

Senior Benefits Consultant

## NEXT (National Exposure & X-Training)

NEXT is a non-officer group dedicated to educating, developing and enriching both internally and externally facing colleagues so they are prepared to become future Segal leaders. In 2023, its third year, NEXT had more than 200 members enhancing their skills, as well as networking and cross-training with peers.

NEXT focuses on:

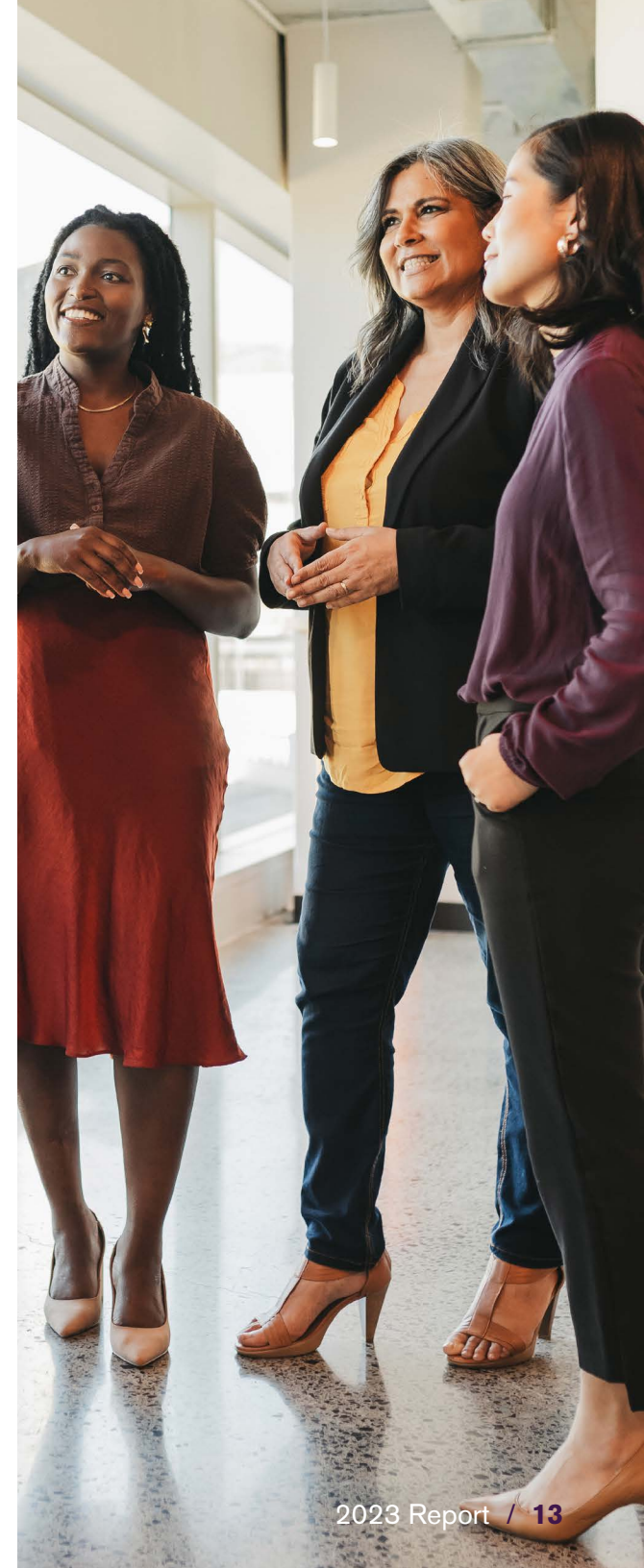
**Expert advice.** Consulting is not limited by geography or external clients. Our clients (internal and external) should receive the best consulting regardless of location.

**Essential skills.** Our clients rely on our ability to provide technical knowledge, project management skills and broad benefits-related services.

**Consistent growth.** We drive new business and revenue growth through expanded service offerings and a comprehensive knowledge and application of Segal's expertise.



More than 25% of  
non-officers participated  
in NEXT in 2023.



\* This person's title changed in 2024.



Some highlights from NEXT 2023 were:

**Podcasts.** Helene Dankner, Chief Human Resources Officer & Senior Vice President, John DeMairo, President and CEO, Segal Marco Advisors, and John Flynn, Senior Vice President and Chief Operating Officer, discussed the reasons to seek an officer promotion, the various responsibilities that come with that new role and how the process works at Segal. Vanessa Flynn, Vice President and Senior Consultant, and Brandon Moore, Senior Vice President and Business Developer at Segal Benz, shared what it takes to develop client relationships and be successful consultants.

**Simulations and case studies.** These included a branding process workshop and simulation hosted by Caitlin Brewer, Director, Graphic Design, Segal Benz, and a cybersecurity services case study hosted by Michael Stoyanovich, Vice President & Senior Consultant, Administration & Technology Consulting.

**Training sessions.** Topics included “Public Relations Dos and Don’ts” with Amira Rubin, Vice President of Public Relations, “Consulting Skills and Best Practices” with Michael Marks, Senior Vice President and Consulting Actuary, and Amanda Baker, Consulting Actuary, and “Brand You: Making Who You Are Make a Difference” by Kevin Carrington, Senior Vice President, Senior Consultant, Southeast Higher Education Practice and Federal Practice Leader.

**Peer group and networking.** Members of the NEXT steering committee led conversations on consulting conundrums. In another session, Vinny Graziano, Senior Vice President and Health Benefits Manager, and Kerri Donald Sears, Senior Vice President, Human Resources, provided insight and advice, followed by a discussion about how to have difficult conversations with your manager.

**Buddy program.** Members of NEXT who elect to join this optional program are paired with a peer at the same level who is in a different practice/group. This provides an opportunity to connect with and get to know others in the organization with whom they may not otherwise engage organically.

Learn more about and join NEXT by emailing the NEXT committee — it’s that easy!



// NEXT is a motivator and inspiration. From the lens of a participating member of the NEXT peer group since the inception of the program to the lens of a contributing member of the NEXT leadership team, I value the role that the program has played in my career development and advancement through its variety of interactive and educational sessions. NEXT fosters an inclusive environment at Segal, facilitates the opportunity to build relationships across the company and creates a space to learn from colleagues’ diverse perspectives and experiences. A value derived from my participation in the program is the confidence boost in my adherence to professional and client standards with internal and external client-facing experiences. NEXT is a community, and my participation in the program continually proves to be one of the motivators and inspiration that propels my daily work performance and career vision.”

**Debbie Onimole-Brown**

Associate Consultant, Compliance-Retirement





// “Segal’s Management Development Program, which offers structured pathways for skill enhancement and leadership development (aligning closely with Segal’s EVP emphasis on career growth), is instrumental in fostering my readiness for future managerial roles within the company. Through targeted learning trainings and debrief sessions with my peers, I’ve been able to gain skills and expertise necessary for higher-level roles. The program has also enriched my professional network.”

**Anna Bell**

Vice President, Insurance  
Brokerage Practice

## Management Development Program

Our Learning & Development team created a Management Development Program that began in March 2023. This program covers managerial and leadership topics and provides a blended learning experience related to managing and developing employees, ensuring successful team outcomes and influencing/change management. Courses were selected to ensure our leaders and managers have the critical skills and competencies they need to manage their teams and continue to meet their business imperatives.

The first three cohorts are working through the three phases of this program:

**Phase 1** covers managing people, performance management and developing employees.

**Phase 2** covers active listening, delegating tasks and accountability, and coaching and managing conflict.

**Phase 3** covers planning for successful team outcomes, critical thinking/solving problems, change management and influencing and persuading others.

Each individual phase of blended learning consists of three to four hours of online courses (independent learning) and one hour of facilitated small group discussion (via Teams) for each topic covered in a phase. The small group discussions are particularly valuable for comparing notes with colleagues on management challenges, opportunities and insights from each other’s perspective and experience on applying these new skills.



**84 managers participated  
in Phase 1 of our first  
Management Development  
Program in 2023.**





## Recruiting

We continue to broaden our sourcing efforts to improve our recruitment of underrepresented minorities, women, veterans and individuals who have a disability. We continue to cultivate our relationships with the International Association of Black Actuaries and the Organization of Latino Actuaries (OLA) which resulted in increasing Segal's visibility among and hiring of diverse professionals. We have made progress in developing partnerships with veteran organizations to improve our outreach and sourcing of veterans.

Our campus recruiting effort has been growing and with it our hiring of diverse talent early in their careers. We continue to elevate our sourcing strategies by targeting diverse associations who align with our talent needs to build long-term relationships.

The talent acquisition page on SegalNet includes links to information about recruitment tools and the talent pipeline.

**In 2023, we participated in more than 20 entry-level recruiting events between OLA, the IABA and on-campus sessions.**



// I'm proud of Segal's commitment to building a more inclusive workplace through our recruiting initiatives, partnerships and having a work environment that lets us be our authentic selves."

**Marcos A. Morales**

Senior Consultant, Talent Acquisition



// I learned about Segal during a career fair at the 2023 ALPFA\* Convention, which I attended with sponsorship from OLA. I accepted the offer to join Segal because of the great benefits, there was an opening within the retirement team (retirement is one of my interests within the actuarial career), and the actuaries I interviewed with were all fantastic people. I saw the perfect opportunity to pivot from my career in education to help me grow both inside and outside of the actuarial profession."

**Hector Perez Montenegro**

Actuarial Associate, West Region



## Internship Program

Our Internship Program is designed to promote and support DEI at Segal. Internships provide students with meaningful business experience to enhance their academic education and prepare for post-graduate careers, as well as provide Segal with a strong pipeline of talent. Since formalizing the program in 2018, more than 150 people have participated, with the number of full-time hires from the program continuing to increase.

Segal encourages all business units to work with undergraduate and graduate student interns. In 2023, we had interns across a broad spectrum of our organization, including Business Operations, Administration & Technology Consulting, Benefit Audit Solutions, Communications (Segal Benz) Compliance, Health, Health Consulting & Analytics, Insurance Brokerage, Retirement and Investment Consulting (Segal Marco Advisors).

We emphasize the importance of diverse intern recruitment and hiring. We actively seek students who are members of underrepresented groups and women, along with other qualified candidates. In 2023, we made full-time offers to 16 of our rising seniors or graduate student interns, 12 of whom accepted.



**75% of the interns to whom we made full-time offers in 2023 accepted.**



“Throughout my summer 2022 internship at Segal with the Benefit Audit Solutions Practice, and then again in 2023 with the Health Consulting & Analytics Practice, I found myself deeply resonating with the company’s unique culture. Engaged in projects that held genuine significance, I not only refined my skills but also benefited from the guidance of seasoned experts who played a pivotal role in nurturing my professional development. The collaborative spirit of the group project provided a platform to interact with bright minds from diverse Segal practices, offering a multifaceted learning experience that unequivocally reinforced my commitment to pursuing a full-time role with Segal.”

### **Shreya Singhal**

Health Benefits Data Analyst,  
Health Consulting & Analytics





## The Segal Advantage

Our Learning & Development team offers the Segal Advantage Program, which gives employees the opportunity to learn about Segal's different services and practice offerings.

The program, which began in 2017, is open to all employees.

In Segal Advantage sessions, members of a practice typically discuss:

- The practice's purpose and function
- An overview of services currently offered
- Who decides to purchase those services
- How we obtain the business
- Who our main competitors are for the practice's services
- Clients served
- Key trends impacting clients and our services, including how we deliver them
- How the practice interacts with other business units to deliver our best consulting advice

Presenters may also mention new services the practice is considering and where the practice is heading.

Sessions are recorded for those who are unable to attend the live presentation.

2023 sessions included Benefit Audit Solutions and the Insurance Brokerage Practice.

The Learning & Development team also maintains a comprehensive Learning & Development Catalog.

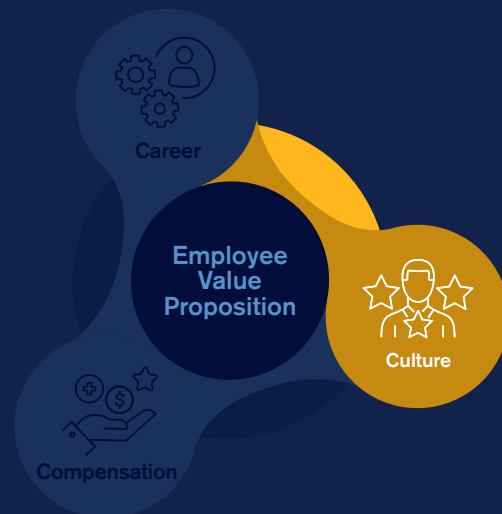
## Culture

Segal has a special culture. DEI is an increasingly important part of it.

In February 2023, results of the confidential, companywide DEI survey that was conducted in 2022 by a DEI consulting firm were shared during an all-company Kitchen Table Talk. More than 500 employees completed the survey. A majority (86.5 percent) indicated they “believe DEI is important to the organization” and 72.6 percent agreed that “the work environment at Segal is inclusive of people of all backgrounds.” About two-thirds indicated they have the ability to balance their work and personal lives; feel empowered to express different views and opinions and can be their authentic selves at work.

In July 2023, we announced the launch of BOLD, our fourth business resource group (BRG). Our BRGs were active throughout the year. Participation in our weekly Candid Conversation grew and those who joined were engaged, as the flurry of comments in the Teams chat demonstrated.

Our welcoming and learning culture is one reason why so many employees spend their careers at Segal. It’s also a factor in why employees who left, later chose to return. As of the publication date of this report, we have more than 60 of these “boomerang” employees.



- We are mission driven and client focused.
- We care for and support each other.
- We are taking action to make our workplace diverse, equitable, and inclusive so that we can engage as our authentic selves.
- We offer a flexible work environment that works for our people and fosters agility and innovation.



“I rejoined Segal, which is where I began my actuarial career, for several reasons. I have a great manager and a terrific team. The tools created by ATS, as well as our general procedures, allow us to consistently produce high-quality work and make our jobs easier. I see a future at Segal because I enjoy working with multiemployer retirement plans. Although I always thought I’d be back, I returned sooner than I’d planned, and I feel like I never left.”

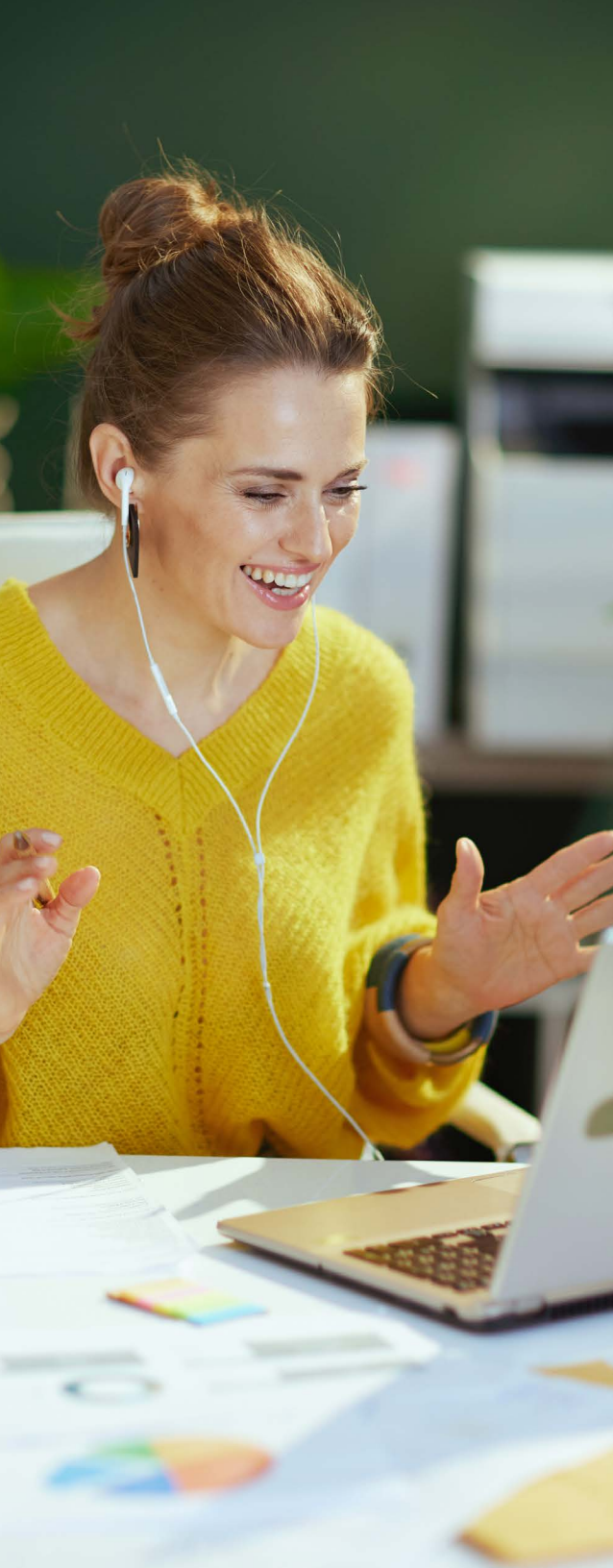
**Benjamin Rubin\***

Associate Actuarial Consultant

\* Ben's title changed in 2024.







## Candid Conversations

Every Friday, all of us are invited to join a companywide Candid Conversation, a non-judgmental “safe space” for discussion and learning from each other and subject matter experts on a wide variety of topics.

On average, approximately 125 of us (more than 10 percent of all employees) attend each week.

### Candid Conversations Committee

**Joshua Meyer** (Chair)

Vice President, Communications Segal Benz

**Joey Allen**

Senior Consultant, Segal Benz

**Joseph Bedics**

Associate Consultant, Information Technology

**Patience Boyd**

Administrative Assistant, Boston

**Lon Burke**

Vice President and Senior Consultant

**Sunday Coulter**

Vice President, Design & Brand Management  
Leader, Marketing

**Steven Greenspan**

Senior Vice President, General Counsel and  
Corporate Secretary

**Rebecca Herring**

Associate Consultant, Administration and  
Technology Consulting

**Emily Jordan**

Vice President, Legal

**Rosa Limas**

Vice President, Segal Marco Advisors

**Tiara Moske**

Senior Consultant, Segal Benz

**Sonia Richardson**

Office Services Manager, Washington, DC

**Jeremy Roberts**

Vice President and Actuary

**Tracie Saunders**

Director, Travel and Corporate Events

**Marell Ellis Thomas**

Client Service Associate, Retirement Compliance

**Linda Wolven**

Vice President, Communications, Segal Benz



“The company’s support for an egalitarian, inclusive forum allows colleagues to set aside work for an hour and engage in meaningful discussion about issues outside their normal sphere.”

**Patience Boyd**

Administrative Assistant, East Region

### Topics related to recognition and heritage months

In February, during Black History Month, the conversations focused on:

- “The African Presence Around the World, Past & Present,” a presentation by historian C. R. Gibbs
- “Trauma and Tragedy Meets Patriotic Blackness,” with Mark Craig, a protester in the 1992 LA uprising
- An employee panel discussion about the African Diaspora
- Black History Month Jeopardy

For Women’s History Month in March, the Women’s Leadership Council (WLC) organized the five conversations noted on page 34.

In May, for Asian American and Pacific Islander (AAPI) Heritage Month, the conversations focused on:

- AAPI trivia contest
- Cooking class and talk about kimchi by Chef Ji Hye Kim of Miss Kim restaurant in Ann Arbor, MI
- Wellness discussion on AAPI health issues

The DEI Communications and Content Committee organized the conversations for National Hispanic Heritage Month in October. See page 27 for the details about those Candid Conversations. Our newest BRG, BOLD, organized the conversations for and Native American Heritage Month in November. See page 31.

### Health and well-being topics

In addition to the health and well-being topics that were covered during recognition and heritage months, we had Candid Conversations on:

- Perspectives on diet, relationships with food and healthy living
- “NFL Player Safety,” a talk with retired football player Harry Carson
- Gratitude and how it helps at work and home
- How heart attack signs can be different in men and women
- Keeping kids safe from drugs
- “Peaceful Practices During Trying Times,” tips for self-care and helping others

### DEI-focused topics

Our DEI-focused Candid Conversations covered:

- Scott Brown, a writer for and co-executive producer of *Grey’s Anatomy*, on why representation matters
- A talk about neurodiversity for Mental Health Awareness Month
- Another organization’s internal and external DEI efforts
- Body positivity
- Themes from the DEI consulting firm’s work with Segal



// The conversations that have occurred in Candid Conversations demonstrate the commitment to DEI through people sharing their cultures, values and views on how to work together as an organization. It has not only helped me professionally, but personally as well.”

**Becky Herring**

Associate Consultant, Administration  
& Technology Consulting

**Topics in the news**

We discussed:

The women-led uprising in Iran

- Recent U.S. Supreme Court decisions
- **The uses, and pros and cons of AI** .....
- Antisemitism



**Candid Conversation with the  
highest attendance: 194**

**Sharing our traditions and experiences**

We learned from each other by sharing:

- How we celebrate spring holidays, Juneteenth and fall holidays
- Back-to-school experiences (our own and our kids')
- Our first jobs and what we learned

**Celebrating each other**

We devoted a Candid Conversation to sharing appreciation, kindness and gratitude to a colleague. Another celebrated colleagues who've won DEI awards.

**Just-for-fun topics**

2023 Candid Conversations also covered our pets and, for a talk on Friday the thirteenth, the superstitions of our families and cultures.

During the last 2023 Candid Conversation, we shared our reflections on the year and our hopes/ plans for 2024.

Approximately 260 of us — from every region, market, practice and department, across all job levels — have added the Candid Conversation to our Outlook calendars. If it isn't on yours, email the committee. You'll be glad you did!

Whenever you attend a Candid Conversation or any DEI-related Segal event, please code that time to your business unit's DEI event code.







// I love that we have programs that elevate the importance of authenticity, individual appreciation, professional growth and development, unifying a culture of belonging.”

**Rosa Limas**

Vice President, Segal Marco Advisors

## DEI Communications and Content Committee

The DEI Communications and Content Committee leads our internal DEI communications, with oversight from the DEI Steering Committee. The committee collaborates with the Candid Conversation Committee on topics and with the BRGs on messages for the daily CIRcular email.

In October, the committee organized these events for National Hispanic Heritage Month:

- *Lotería*, a popular bingo game with pictures and Spanish words
- Fundraising for DonorsChoose, a nonprofit organization committed to combating racial and social economic inequity in school funding by supporting classroom projects identified by teachers in schools that serve low-income communities and Black, Latino and Native American students
- A conversation with Giovanna “Gigi” Gonzalez of The First Gen Mentor and Rommel Espinal and Bianka Guzman of Fidelity on helping you reach your family’s financial goals
- Hispanic trivia game

## DEI Communications and Content Committee

**Rosa Limas** (Chair)

Vice President, Segal Marco Advisors

**Joey Allen**

Senior Consultant, Segal Benz

**Joe Cerullo**

Senior Consultant, Segal Marco Advisors

**Laura Hensley**

Senior Consultant, Segal Benz

**Albert Malafronte**

Associate Consultant, Insurance Brokerage Practice

**Tracie Saunders**

Director, Travel and Corporate Events



The DEI Communications and Content Committee also works with Marketing, which leads our external DEI communications focusing on social media posts for these heritage and recognition months: Black History Month, Women's History Month, AAPI Heritage Month, Pride Month and National Hispanic Heritage Month. We also recognize many other months and days for a wide range of groups, from veterans and caregivers to people with disabilities and indigenous peoples.

In 2023, we had an overarching theme — social transformation — to connect the social media posts for all heritage and recognition months we celebrated. We featured quotes from employees. Whenever possible, we linked to relevant thought leadership on our websites, connecting our business objectives and consulting expertise with our mission, vision and values.











## Business Resource Groups

BRGs are groups organized around an affiliation, shared special interest or a demographic and work to promote Segal's business. At Segal, everyone is welcome and anyone can fully participate in any of our BRGs. Our BRGs are formed to:

- Support the advancement of DEI at Segal
- Promote our business and our goals
- Align with Segal's vision, values, policies and practices
- Have broad appeal among employees

Currently, we have four BRGs: BOLD (BIPOC Organizational Leadership Development), Pride@Segal, Segal CARES and the Women's Leadership Council. Each BRG has enthusiastic committee members who work on planning the BRG's events and creating communications.

Once again, our BRGs took the lead on fundraising, including selecting which charities to support. In 2023, between Segal employees and Segal matches, nearly \$5,500 was contributed to organizations such as the Alzheimer's Association Walk to End Alzheimer's, the Campaign for Southern Equality, DonorsChoose, the National Asian American Pacific Islander Mental Health Association, Sicangu and Susan G. Komen.

During our all-company virtual holiday party, pairs of colleagues competed against each other in a game show to win money for charities supported by our BRGs and the DEI Communications and Content Committee. The first-place team won \$2,000, which was divided equally between two charities. The second-place team won \$1,500, which was also evenly split between two charities. The third-place team won \$500 for each of two charities.

On the following pages, learn more about each BRG, its 2023 leadership and a sampling of activities.

Interested in forming a BRG? See SegalNet for what's involved.

## BOLD

BOLD, which stands for BIPOC Organizational Leadership & Development, launched in July 2023. BOLD is dedicated to the support, inclusion and celebration of racial and ethnic cultural diversity. BIPOC stands for Black, Indigenous and People of Color and is an acronym used as an inclusive label for people of color. BOLD's mission is to empower BIPOC employees through BOLD's established goals and objectives while supporting Segal's business goals and our collective efforts to increase and sustain a diverse, equitable and inclusive workplace.

BOLD's first events were in November for Native American Heritage Month. BOLD sponsored two Candid Conversations:

- Jillian Kristan Waln from the Sičanǵu, which aims to improve the financial and social well-being of the Sičanǵu Lakota nation, explained how Sičanǵu is guided and inspired by the 7Gen Vision, which imagines the type of world we'd like to see our descendants living in 175 years from now.
- Cyndee Fox-Starr of American Indian Health Service of Chicago, Inc., discussed the organization's mission.



### BOLD Steering Committee

**Joey Allen** (Chair)

Senior Consultant, Segal Benz

**Sonia Richardson** (Communications Liaison)

Office Services Manager, Washington, DC

**Elena Charleston**

Senior Consultant, Segal Benz

**Ambar Crowell\***

Project Manager, Segal Benz

**Kesha Gerald**

Staff Assistant, New York

**Lisa Kim**

Project Manager, Segal Benz

**Marguerite (Aicha) Kouairy**

Financial Services Associate

**Jennifer T. Laguna**

Senior Consultant, Benefit Audit Solutions

**Marell Ellis Thomas**

Client Service Associate, Retirement Compliance

**Jamaca Mitchell**

Consultant, Health Compliance

**Nura Patani**

Senior Vice President, Consulting Actuary  
and West Region Health Practice Leader

**Shenoora Kara**

Senior Consultant, Segal Benz

**Sonal Sanghvi**

Marketing Associate Consultant, New York

**Celerie White**

Vice President, Segal Benz

**Desmond Wijelath**

Senior Financial Services Revenue Specialist,  
Financial Services

**Donell Ward**

Director, Segal Marco Advisors

**Heather Zhang**

Senior Actuarial Associate



\* Ambar's title changed in 2024.



## Pride@Segal

Pride@Segal began in 2020. This BRG supports a diverse and inclusive environment at Segal and helps establish Segal as a leader and employer of choice in the LGBTQIA+ community. Pride@Segal sponsors educational sessions, leads Pride Month communications and organizes events that have raised thousands of dollars for LGBTQIA+ nonprofits.

For Pride Month 2023, Pride@Segal organized these events:

- A talk by Jamie Bruesehoff, who first spoke with us in 2022, to discuss her new book: “Raising Kids beyond the Binary: Celebrating God’s Transgender and Gender-Diverse Children”
- “Be Proud and Knowledgeable: A Comprehensive Guide to Fostering an LGBTQ-Inclusive Workplace,” a presentation by Amari McGee
- “Are You N-2 Drag Queen Bingo?” Hosted by drag queen Genisis
- “Segal Then & Now with Clients and at Segal,” a talk by Andrew Sherman about what Pride has accomplished

During Pride Month, Pride@Segal sold custom “Love Every Letter” T-shirts to raise money for two LGBTQIA+ organizations: [Campaign for Southern Equality](#) and [Food Outreach, Inc.](#)

Other 2023 Pride@Segal activity included:

- A talk by leadership coach Chris Rollins on “The Ripple Effect of Inclusivity in Leadership”
- A message in the CIRcular for National Coming Out Day (October 11)
- A presentation by Gerard Koskovich, San Francisco-based historian, curator, rare book dealer and a founding member of the GLBT Historical Society on ways of identifying, preserving and interpreting LGBTQ historic sites

## Pride@Segal Leadership Group

### Erika Eill

Vice President, Actuarial Technology and Systems

### Bella Giannetti

Communications Associate, Segal Benz

### Briana Hodge

Communications Associate, Segal Benz

### Brian Misso\*

Senior Consultant, Content, Segal Benz

### Tiara Moske

Senior Consultant, Segal Benz

### Cory Mote

Project Manager, Segal Benz

### Cassandra Roth

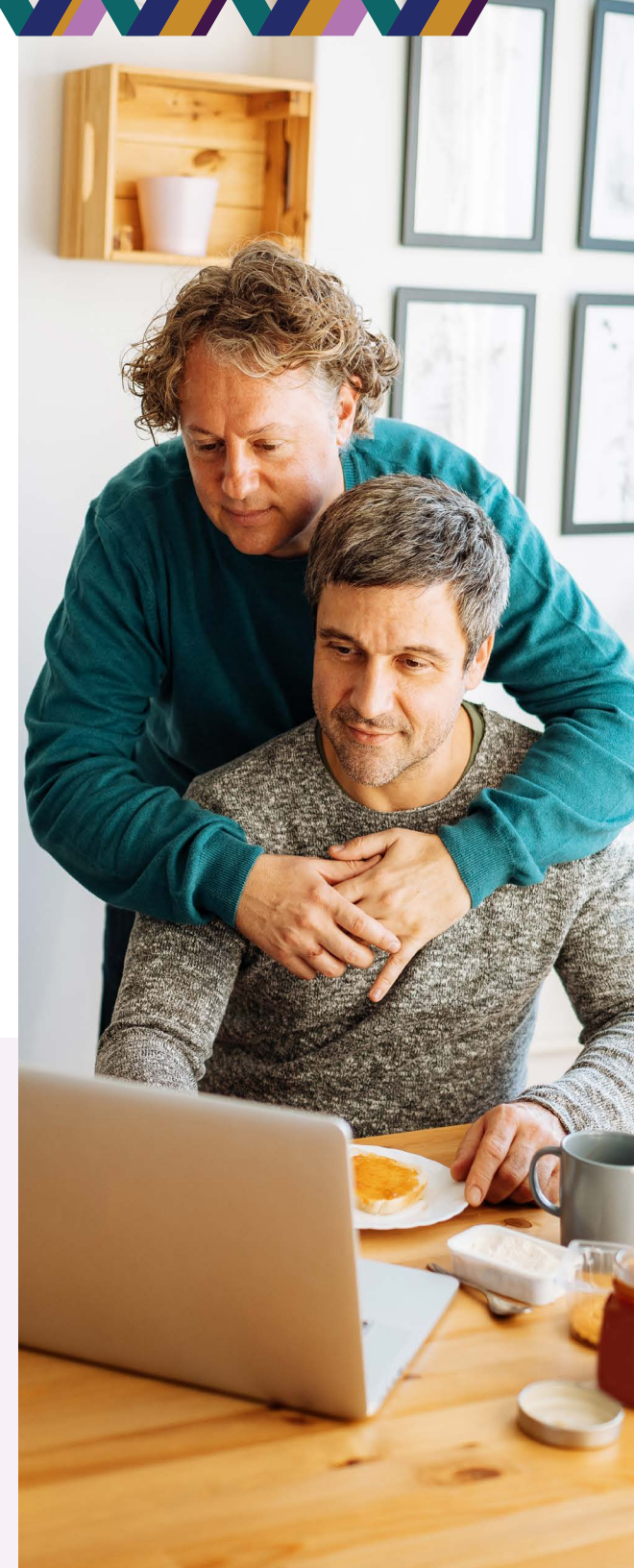
Senior Consultant, Segal Benz

### Ettore Toppi

Senior Consultant, Segal Benz



\* Brian's title changed in 2024.



## Segal CARES

Segal CARES — an acronym for Caregiver Resources, Engagement and Support — was created in 2020, in part to help caregivers who faced increased responsibilities during the pandemic. The BRG's long-term goal is to connect with, support and advocate for all caregivers at Segal.

In 2023, Segal CARES sponsored these events:

- Building a Financial Future for Dependents with Special Needs
- A Peek Into Segal's Paid Family Leave Playbook
- 2023 Walk to End Alzheimer's Disease
- Sharing is Caring Holiday Gift Exchange



### Segal CARES Steering Committee

**Maureen McCoy** (Co-Chair)

Vice President, Human Resources

**Stacey Simon** (Co-Chair)

Senior Consultant, Segal Benz

**Carla D. Bailey**

Administrative Assistant

**Rachel Calisi**

Senior Benefits Consultant

**Eric Gonzalez**

Senior Project Manager, Information Technology

**Michelle Lyn**

Vice President, Project Management Leader,  
Segal Benz

**Ann McKeve**

Administrative Assistant

**Eric Miller**

Vice President, Consulting Actuary Health  
Technical Services

**Susan Schwarzman**

Senior Consultant, Administration and  
Technology Consulting



## Women's Leadership Council

The Women's Leadership Council (WLC) was launched in 2019. The WLC focuses on hosting activities that strengthen leadership and opportunity for women at Segal; providing a forum for all staff who want to help women achieve career success, develop skills and deliver business results; and serving as one of the ways Segal can attract and retain a strong multicultural workforce.

In March 2023, for Women's History Month, the WLC hosted the weekly companywide Candid Conversation on these topics in discussions led by colleagues:

- Mental health and tools and resources for a healthy mindset
- A variety of health topics unique to women's physical health
- Financial literacy, including what goes into a credit score and how to improve it, tracking your debt, planning for retirement and making a budget
- Segal benefits that are focused on women's health
- Segal women career path panel

During the first of these Candid Conversations, which was held on International Women's Day 2023, the WLC recognized the theme of "Embrace Equity" and organized a virtual photo shoot for a Segal LinkedIn post.

Later in the year, the WLC hosted:

- A Candid Conversation with Staci Rossi, Senior Director, Clinical Consulting Consultant, on "Work-Life Balance" that included a wheel of life exercise
- An interactive workshop on "The Four Secret Ingredients for Change" with transformational coach Ashley Jablow
- A Candid Conversation for Women's Equality Day on women who inspire us
- A Candid Conversation Pink Party for Breast Cancer Awareness Month and to discuss reactions to the *Barbie* movie
- "Laughter Is the Best Medicine," a talk by comedienne Liz Joynt Sandberg on the power of humor to help us shift the way we think, get work done and solve problems when interacting with colleagues and clients

The WLC sold [custom shirts](#) to raise money for the Susan G. Komen charitable organization to help fight breast cancer.



## WLC Steering Committee

**Mary Kirby** (Co-Chair)

Senior Vice President and Consulting Actuary

**Amy Timmons** (Co-Chair)

Senior Vice President, Administration and Technology Consulting

**Erin Burns**

Vice President, Marketing

**Judith Goodstein**

Senior Vice President and Actuary

**Barbara Kissner**

Senior Vice President, Chief Information Officer

**Rosa Limas**

Vice President, Segal Marco Advisors

**Vibha Mittal**

Consultant, Administration and Technology Consulting

**Linda Piscitello-Crugnale**

Office Services Manager, Boston

**Kyra Poplaski\***

Senior Benefits Consultant

**Diane Swisher**

Vice President, Segal Benz

**Amira Rubin**

Vice President of Public Relations







// On behalf of the DEI Steering Committee, I give heartfelt thanks to everyone who contributed to helping us make progress in our DEI journey in 2023, by helping to set up our newest BRG, organizing events, participating in programs and activities, creating or reviewing other content and making time to learn more about DEI. It's encouraging to see activity and engagement increase every year."

**Andrew D. Sherman**

Senior Vice President, National  
Public Sector Market Director and  
Chair of the DEI Steering Committee

## DEI Steering Committee

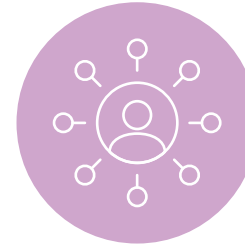
The DEI Steering Committee has four core responsibilities. It:



**Develops**  
strategy and  
communicates  
vision



**Coordinates**  
the DEI Communications  
and Content  
Committee and the  
Candid Conversations  
Committee



**Facilitates**  
Business Resource  
Groups (BRGs)



**Collaborates**  
with leadership,  
Human Resources  
and managers

In these roles, the committee oversees our DEI strategy, policies and practices and coordinates DEI efforts companywide. It also provides guidance, approves resource requests and monitors our activities and actions. The DEI Steering Committee assists BRGs with mission, programming, budgets, internal communications and works with our marketing colleagues on external communications and social media posts related to DEI, including posts featuring Segal employees for recognition and heritage months.

Together with leadership, the DEI Steering Committee is developing key performance indicators (KPIs) for DEI based on data that Segal has worked with external consultants to gather and analyze since 2022. Those KPIs will be rolled out in 2024.

## DEI Steering Committee

### Members



**Kevin Carrington**

Senior Vice President, Senior Consultant, Southeast Higher Education Practice, and Federal Practice Leader



**Kerri Donald Sears**

Senior Vice President and Human Resources Operations Officer



**Michael Khamis**

Vice President, New Client Acquisition



**Andrew Sherman** (Chair)

Senior Vice President and National Public Sector Market Director



**Lissette Ortiz**

Vice President & Consulting Actuary



**Vanessa Vargas Guijarro**

Vice President, Segal Marco Advisors

### Advisers

**Helene Dankner**

Senior Vice President and Chief Human Resources Officer

**Brett McCarty**

Senior Vice President and Marketing Leader

**Diane McNally**

Senior Vice President and Leader of the Insurance Brokerage Practice



## Other ways Segal promotes DEI

### Communication channels

The CIRcular, Segal's companywide daily email for employees, frequently includes messages and facts about DEI topics.

The Village in Microsoft Teams is another forum for all employees to share content and connect with one another. Each BRG has its own channel in The Village.

To get notified whenever content is added to The Village in Microsoft Teams, go to the three dots in the upper right corner of each Teams channel that interests you — for example, General, Segal CARES, Pride@Segal, REACH (BOLD's channel) and the Women's Leadership Council — and select "Channel notifications" then choose "All activity."

### Other companywide training programs

To reinforce our commitment to providing a collegial and inclusive environment that treats each of us with respect and dignity, we require all employees to complete two important annual training programs: Bias Awareness training and Preventing Discrimination and Harassment training.

Our Bias Awareness training is designed to help us become aware of implicit and unconscious biases, and how eliminating these biases will allow for a more diverse and inclusive work environment. The Preventing Discrimination and Harassment training helps us all better understand the laws pertaining to discrimination and harassment in the workplace and includes training on sexual harassment, discrimination and bystander intervention.

### Consulting

We offer many DEI-related consulting services delivered by every practice.

See the list of our DEI services on SegalNet, which we update quarterly.

Andrew D. Sherman notes:

While advancing DEI at Segal is part of our business strategy because we firmly believe that bringing diverse perspectives to projects enables us to deliver our best possible advice to clients, we fully understand that not every client shares our point of view. Consequently, Segal takes into account each client's priorities, perspectives and needs, as well as the pressures and constraints they face, when making our consulting recommendations.







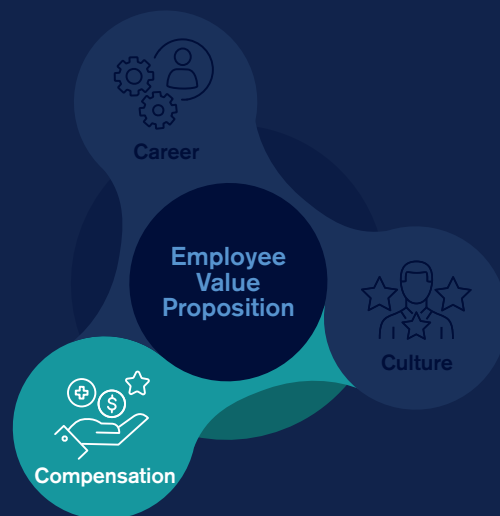
## Compensation

Compensation at Segal is encompassed in our Total Rewards Philosophy.

Segal provides a broad array of benefits and rewards. We have the privilege of working in a financially stable, successful, professional organization that offers opportunities to expand professional knowledge and skill sets in a supportive and collegial environment.

In addition to competitive base pay and the opportunity for incentive compensation, employees have access to health, retirement, insurance, wellness and paid time off benefits including vacation, personal time, paid family leave, sick time, holidays and a sabbatical program.

We offer a hybrid and flexible work environment to help employees achieve work/life balance. We continue to advance our education programs to better engage all employees at every level through our learning environment. We capitalize on opportunities to improve technology, ergonomics and accessibility for better work environments, virtual and physical.



- Our financial rewards care for you now, and in the future.
- We offer competitive cash compensation.
- Our health and wellness programs encourage a healthy lifestyle and share expenses reasonably between the company and employees.
- Our retirement programs are competitive and reward tenure and loyalty.
- We offer little things that show we care and create big impact.





## Pay equity

We hold ourselves to high standards on our pay equity practices and have for many years, always doing a thorough review during our annual merit and AIP bonus compensation planning as well as using that data for our hiring practices. Additionally, since 2019, we've engaged an independent external consultant — on an annual basis — to analyze our total cash compensation. The analysis examines our employee population by gender, race and ethnicity across job function, job level and business unit.

Commencing with this first external annual analysis, we had and continue to receive highly favorable results, with no recommendations to remediate any group. The results demonstrate internal equity on both base pay and bonus awards across gender, race and ethnicity.

To learn more about our standards around compensation, please see the Total Rewards page on SegalNet.

## Benefits

Some of the benefits we offer beyond salary and AIP bonus are:

- A defined benefit pension plan that provides income for life and a pension portal for you to model your estimated future pension benefits
- 401(k) profit sharing plan with automatic enrollment and matching contributions on 50 percent of the amount you contribute, up to 6 percent of your annual salary plus the potential for a discretionary matching contribution
- Comprehensive health and welfare benefits including medical, dental, vision, life, disability and life insurance options with company contributions to costs
- Employee Assistance Program (EAP)
- Tuition reimbursement
- Professional credential programs
- Wellness programs that provide reimbursement for healthy living, home purchase and student debt expenses as well as rewards for health activities
- Paid time off including vacation, holidays, paid family leave, paid sick leave, personal days and sabbaticals
- Mentoring, education and technical training towards professional development and career advancement
- Anniversary and year-end monetary gifts



// Segal’s actuarial program made it possible for me to complete the six remaining exams I needed to qualify as an FSA in three years by providing study time during the workweek and paying for coursework. Equally important was the amazing support I received from my manager, my colleagues — even those who aren’t actuaries! — and my mentors (both official and unofficial), who rooted for my success.”

**Jane Wu**

Senior Health Benefits Analyst

## Professional Credentials Program

Segal supports and encourages employees’ professional development through various credentialing programs, providing exam study time, reimbursement for study materials and compensation enhancement after obtaining credentials:

- Actuarial
- Certified Employee Benefit Specialist® (CEBS) program run by the International Foundation of Employee Benefit Plans
- Certified Insurance Service Representative (CISR) designation offered by the National Alliance for Insurance Education & Research
- Chartered Financial Analyst (CFA) designation offered by the CFA Institute
- Chartered Property Casualty Underwriter (CPCU®) designation
- Registered Professional Liability Underwriter (RPLU) designation

Learn about the Professional Credentials Program.









## Segal by the Numbers

In this section, we share 2023 statistics about the breakdown of our workforce by gender and race/ethnicity.

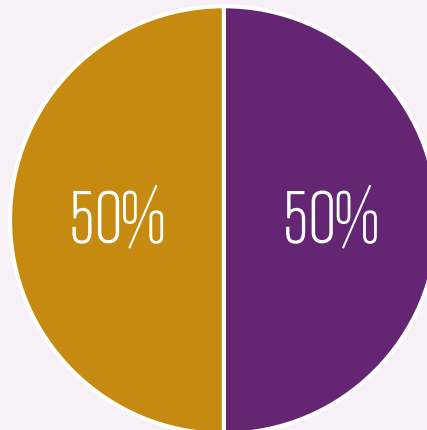
For context, we've compared the population of Segal as a whole to data about people who work in management, professional and related occupations.

It's important to note that all data comes with some limitations. For example, our gender data is based on having asked employees and candidates to self-identify with only two options, male or female, which may not align with every individual's identity. And for any self-reported demographic data, some employees or candidates may choose not to reveal certain information about themselves. We are exploring ways to gather more refined and inclusive information in the future.

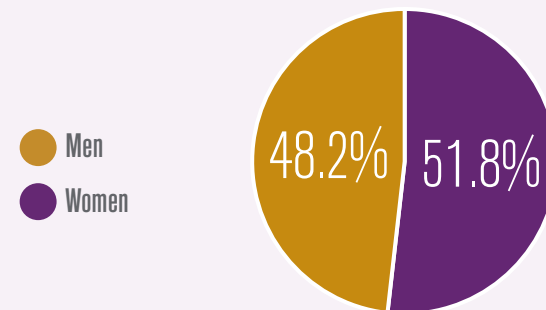
### Gender

At Segal, the percentages of men and women in the workforce are equal — and are similar to the gender breakdown of workers in all management, professional and related occupations, as measured by the U.S. Bureau of Labor Statistics (BLS).

**All Segal Employees**



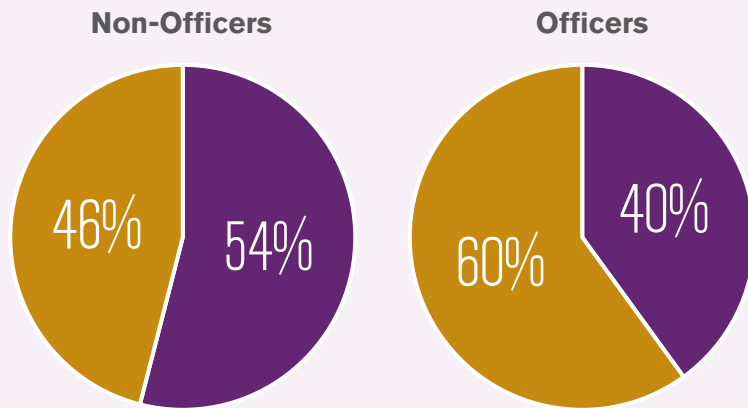
**All U.S. Management, Professional and Related Occupations\***



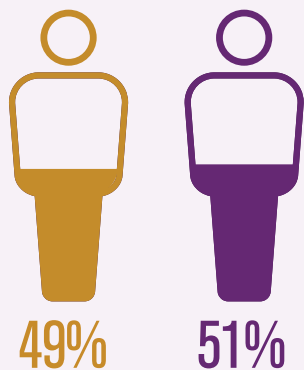
● Men  
● Women



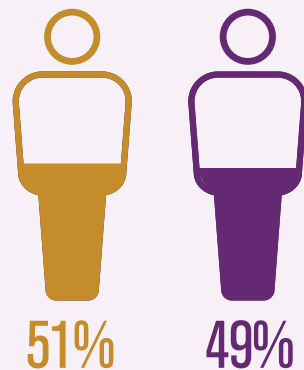
Women are more than half of non-officer employees. The gender breakdown is different for officers. The percentage of women in both groups increased between 2022 and 2023.



Men and women are represented about equally among **non-officer promotions or hires** since 2020.



The percentage of women among **newer officers** — those promoted to or hired as Vice Presidents or Senior Vice Presidents since 2020 — exceeds the percentage of all women officers by 9 points.



### Senior leadership

Our senior leadership is composed of 32 people, including the executive team, regional, market, practice, special practice, actuarial and business operations leaders.



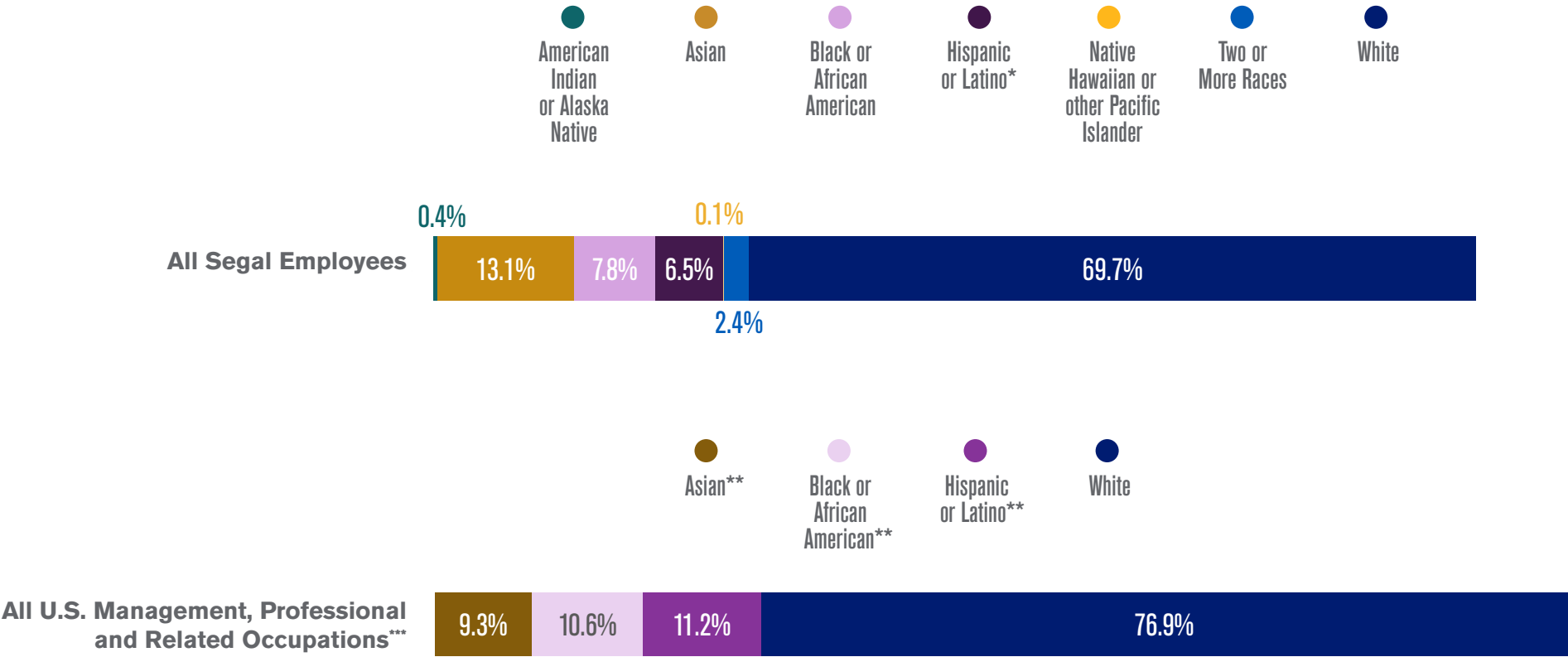
### Board of directors

Segal's board is composed of 11 members: two outside independent directors, three designated board positions (the chair, the vice chair and the President/CEO) and six rotating directors (each elected for a three-year term). Currently, three of the six rotating directors are women.



Race/ethnicity

The percentage of Segal employees who identify as people of color was roughly the same in 2023 (30.3 percent) as in 2022 (30.6 percent).



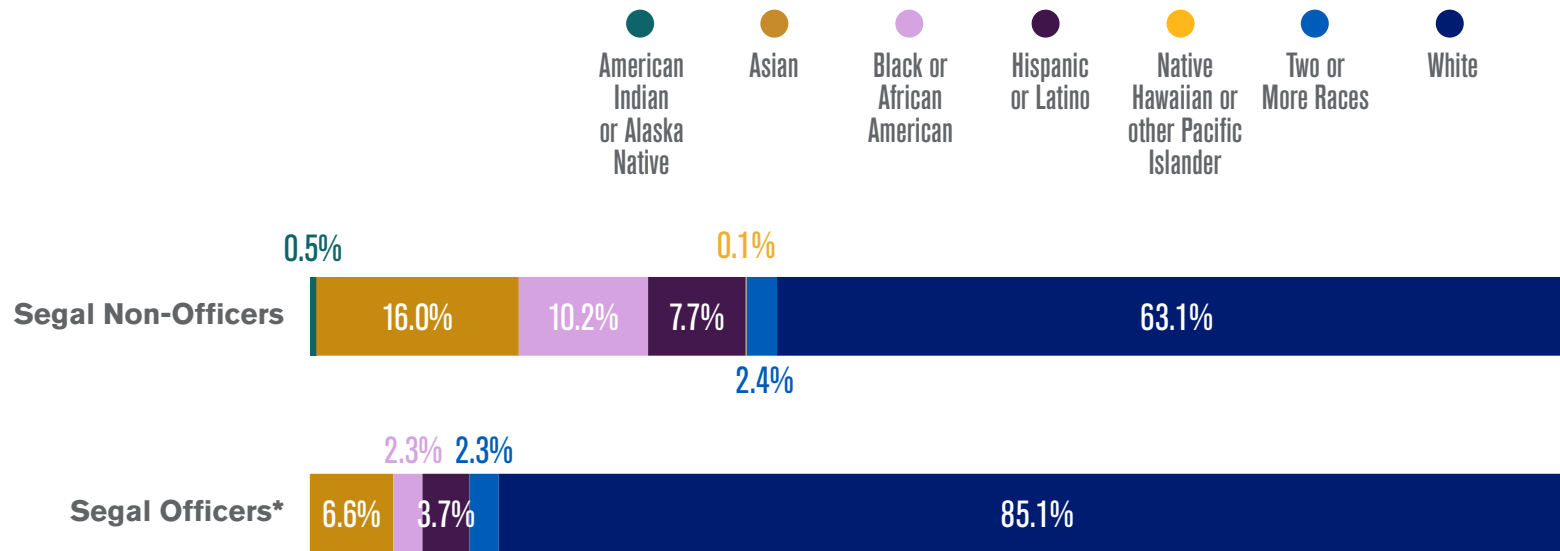
\* This percentage may not accurately reflect our Hispanic and Latino employees because only one option can be selected in HRConnect. Hispanic and Latino employees may have selected “two or more races.” We are working to enhance the options for better self-identification in HRConnect.

\*\* The shade of this key color differs from the shade in the key above to emphasize that the racial categories in both graphs are not directly comparable.

\*\*\* Source: U.S. Bureau of Labor Statistics, Labor Force Statistics from the Current Population Survey, 2023. Note: Estimates for the above race groups (White, Black or African American and Asian) do not sum to totals because data are not presented for all races. Persons whose ethnicity is identified as Hispanic or Latino may be of any race. In other words, the BLS double counts some people who fall into more than one category.



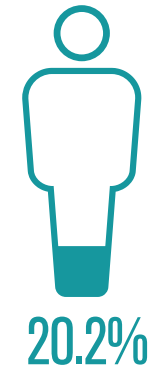
The distribution of race and ethnicity is different among officers and non-officers.



Over one-third of **non-officer promotions or hires** since 2020 self-identify as American Indian or Alaska Native, Asian, Black or African American, Hispanic or Latino, Native Hawaiian or Other Pacific Islander or two or more races.



Among **newer officers** — those promoted to or hired as Vice Presidents or Senior Vice Presidents since 2020 — more than 20 percent self-identify as American Indian or Alaska Native, Asian, Black or African American, Hispanic or Latino, Native Hawaiian or Other Pacific Islander or two or more races.



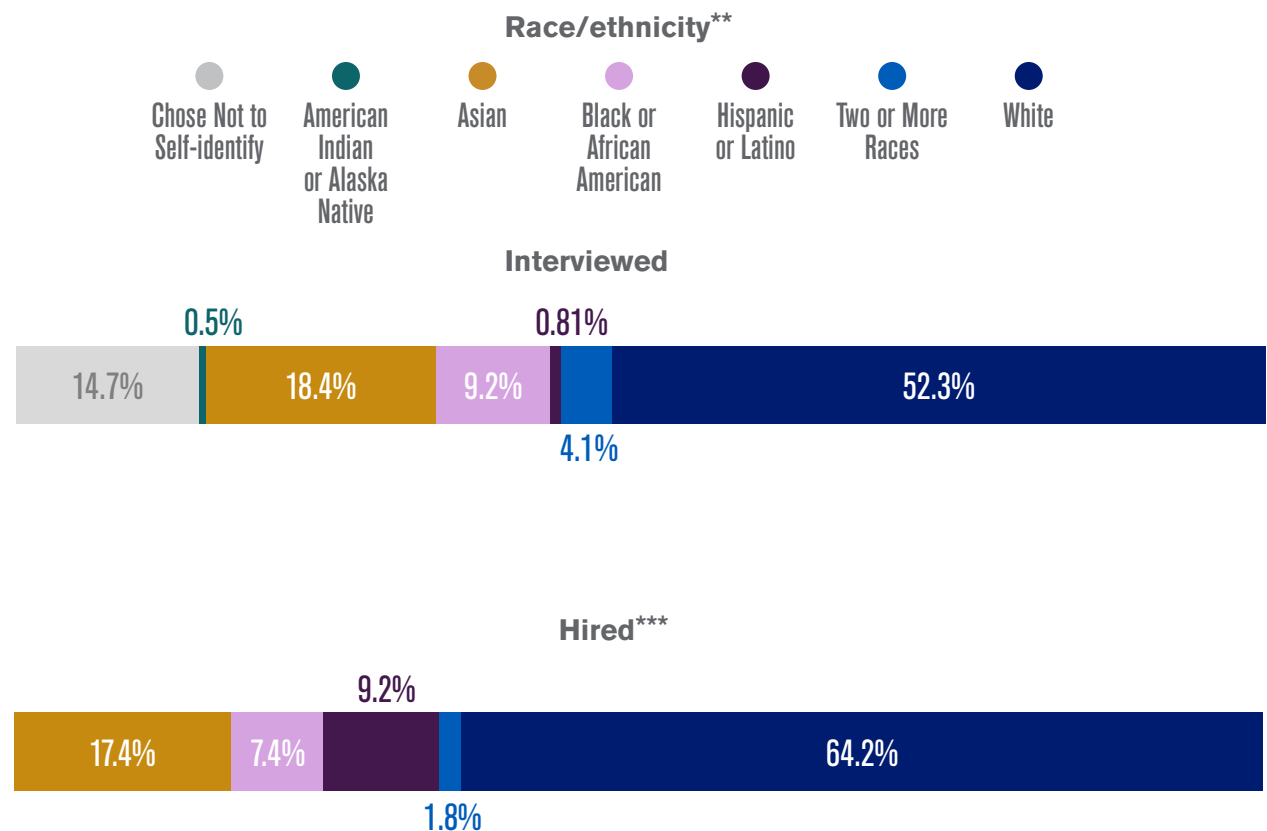
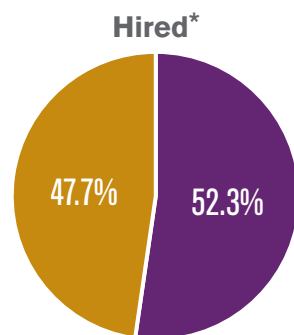
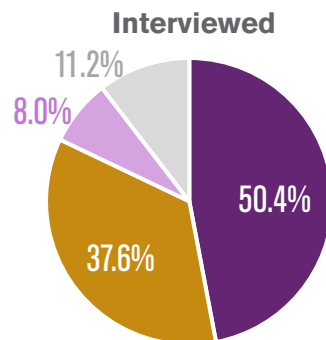
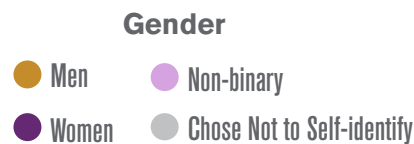
\* In 2023, no Segal officers were American Indian, Alaska Native, Native Hawaiian or Other Pacific Islander.

## 2023 recruitment data by gender and race/ethnicity

When we recruit, we ask candidates to identify their gender and race/ethnicity.

In 2023, double-digit percentages of those interviewed and those hired either chose not to disclose information about gender or skipped the question, which makes it difficult to interpret the data. Among those interviewed who selected a gender or identified as non-binary, just over half identified as women, up from 41 percent in 2022. Among those hired in 2023, a greater percentage identified as women than men, a reversal from those hired during the previous year.

Fewer candidates interviewed in 2023 than in 2022 selected “I chose not to self-identify” for race/ethnicity: 14.7 percent compared to 21.3 percent.



\* HRConnect currently only has binary self-identification. We are working to add non-binary self-identification.

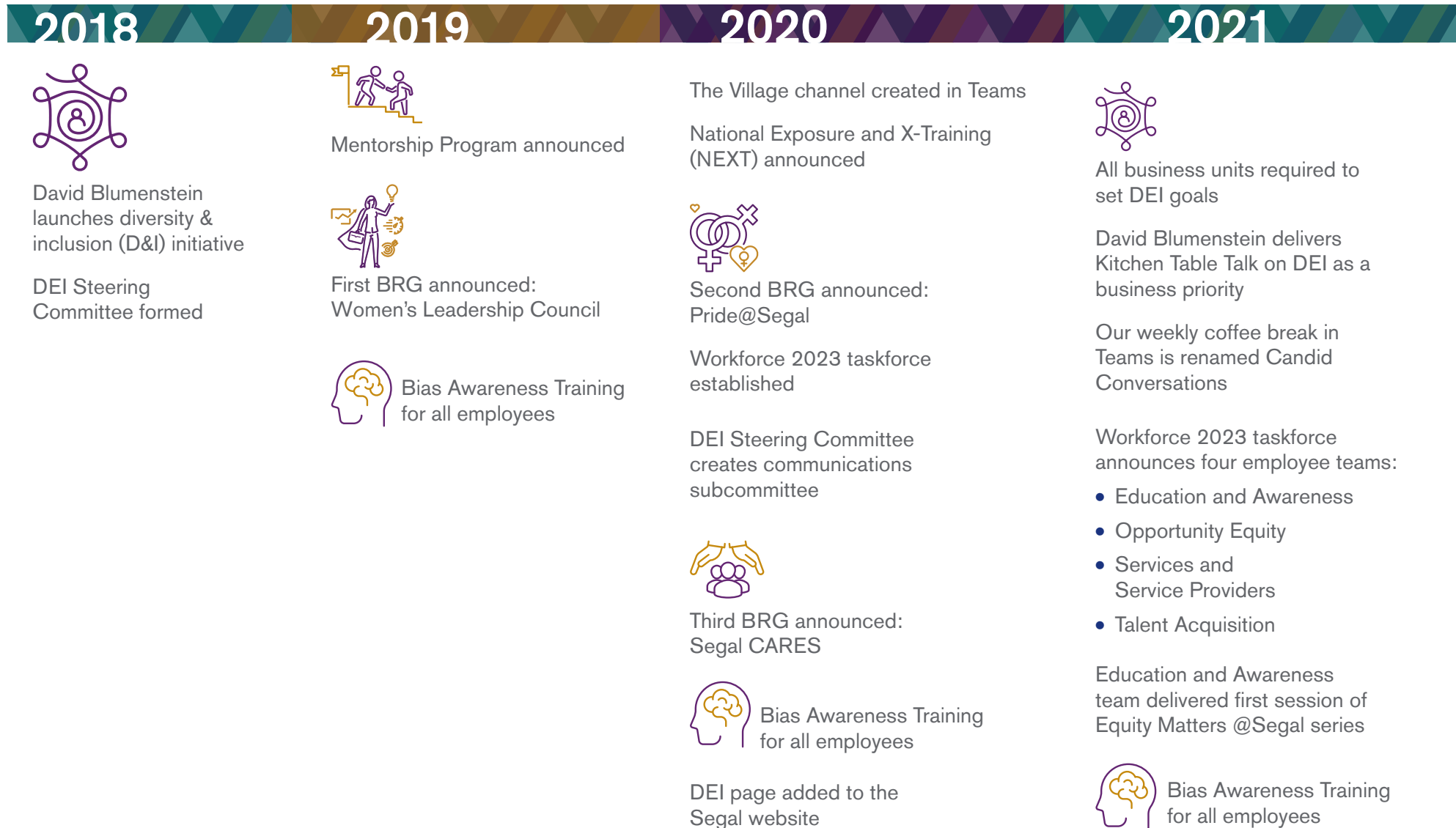
\*\* Not all percentages equal 100% due to rounding.

\*\*\* Since Hispanic or Latino is an ethnicity, some people who are Hispanic or Latino also chose a race or two or more races.





## Summary: Timeline of DEI Milestones



## 2022



All business units required to set DEI goals

Diversity recognized as one of our six core values

David Blumenstein delivers Kitchen Table Talk on Strategy 2025, which includes "implement diversity, equity and inclusion initiatives" as one of eight strategic priorities that will help us achieve strong performance

Understanding Systemic Racism series launched



All employees set DEI goals

DEI Steering Committee changes announced, including new chair

First comprehensive list of all DEI consulting services available

First *Diversity, Equity and Inclusion at Segal* report published



Bias Awareness Training for all employees

Our DEI in Employee Benefits solution launched

DEI questions embedded in the RFPs we issue to vendors

Open enrollment with additional valuable services such as Transition Assistance Transgender Services

Sample language about our DEI initiatives created for sharing with clients or prospective clients

Confidential, companywide DEI survey conducted by a DEI consulting firm

The four Workforce 2023 teams present their recommendations to leadership

## 2023



All business units required to set DEI goals

Procedures recommended by the Workforce 2023 teams integrated into how we work

Second *Diversity, Equity and Inclusion at Segal* report published

Total Rewards initiative begun

Management Development Program launched

Comprehensive list of all DEI consulting services available updated quarterly

DEI consulting firm conducts focus group with employees



Bias Awareness Training for all employees

Career Principles introduced

Career Navigator refreshed

Career development expectations for employees and managers clarified in a series of virtual meetings

Training required for all employees who interview candidates

Candid Conversations Committee formalized and expanded

Page added to the Segal website to aggregate our DEI insights



Fourth BRG launched: BOLD

DEI at Segal webpage expanded significantly, including information about each BRG

DEI page added to the Segal Marco Advisors website



All photos of Segal employees used with their permission. External version.

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