



Diversity, Equity, and Belonging Policy

Callan’s [core values](#) drive the way we run our business. We keep client interests paramount, support the success of each associate, commit to quality and collaboration, work with integrity and inclusiveness, and honor every commitment. Our approach to diversity, equity, and belonging (DEB) reflects these core values and has been a cornerstone of our business since the firm’s founding in 1973. We will continue to engage, innovate, and grow by building a diverse workforce, pursuing equitable outcomes, and creating a sense of belonging for all employees.

Diversity	Recognizing that all individuals and their experiences are unique enhances creativity and innovation.
Equity	Acknowledging that advantages and barriers do exist, it is important to allocate resources fairly to promote equitable opportunities and outcomes.
Belonging	Fostering a sense of belonging by valuing inherent differences and empowering employees encourages them to fully participate, be their authentic selves, and thrive.

Actionable Roadmap for Meaningful Change Now and in the Future

Through our DEB strategy, we are committed to taking the necessary steps to bring change to our firm and our industry. Our efforts are centered on five key areas, and we will continually measure the effectiveness of each.

Education	<ul style="list-style-type: none"> ▶ Implement inclusive leadership training and improve DEB proficiency of all employees ▶ Support industry organizations that advocate for DEB to further our knowledge and teach others
Recruitment	<ul style="list-style-type: none"> ▶ Identify recruitment opportunities to expand our pipeline of diverse candidates ▶ Build on Callan’s Student Educational Summit to enhance our recruitment opportunities and encourage broader representation across our industry ▶ Develop an equitable interview process across all departments and offices, and create an objective evaluation framework for candidates
Mentoring & Training	<ul style="list-style-type: none"> ▶ Design a more equitable onboarding program for new employees ▶ Create a formal mentorship program
Retention	<ul style="list-style-type: none"> ▶ Create employee resource groups to facilitate open dialogue, enhance engagement, and foster learning opportunities ▶ Develop equitable policies for promotion and partnership ▶ Measure employee engagement and satisfaction through tools like annual surveys and “stay interviews,” as well as our progress on diversity
Community Engagement	<ul style="list-style-type: none"> ▶ Develop guidelines for community engagement programs for all employees ▶ Provide opportunities to engage on important cultural events ▶ Expand outreach to diverse asset managers through our research, education, and client engagement, including our longstanding program Callan Connects



Oversight

It is the responsibility of every Callan employee to contribute to and build upon Callan's DEB strategy. However, Callan's DEB Executive Sponsor, Champion, and Council are ultimately responsible for its implementation. The executive sponsor and champion are permanent positions, while council members can rotate to provide opportunities for broad employee involvement over time. Callan's Management Committee regularly reviews our progress on DEB strategy implementation and initiatives and formally reviews the policy annually.

To learn more about our DEB efforts, visit our dedicated [webpage](#).