
Callan's Diversity and Inclusion Policy

Since our founding in 1973, Callan has valued its culture. It is a culture of mutual respect; a collegial culture where people want to work together.

We have an inclusive business environment and we are committed to ensuring that our firm reflects the diversity of the communities we serve. Our clients benefit from the rich diversity of ideas, experiences, skills and perspectives each associate brings to our firm.

Over the years, we have continually explored areas where we can enhance our proactivity in the areas of diversity and inclusion. Some of these areas include:

- Continuing to align Callan with organizations that advocate for diversity, including NASP (National Association of Securities Professionals) and the Robert Toigo Foundation;
- Launching initiatives like Callan Connects, which is a special program developed to expand our universe of emerging manager and minority, women and disabled-owned firms (EM/MWDO);
- Engaging with college and university student groups to make them aware of opportunities at Callan and in our industry;
- Seeking ways to advance social responsibility through charitable giving and active participation in non-profits and our communities.

In our pursuit to fully embrace diversity, we will continue to:

- Treat all with whom we interact with dignity and fairness;
 - Encourage and enable talented individuals with different personalities, points of view, skills, and approaches to collaborate in an environment of mutual support;
 - Promote equal opportunity in all areas of employment and procurement;
 - Better understand the needs of our diverse client base and the communities where we work and live.
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We have put in place the following governance and oversight to ensure that diversity and inclusion remain central themes at Callan:

- Continually review our diversity policy and take proactive measures to advance it;
- Track all positions at Callan by gender and ethnicity.
- Monitor Callan’s supplier base by gender and ethnicity.
- Assign responsibility for monitoring the above metrics to the Senior Vice President of Human Resources.
- Track EMMWDO manager visits, database inclusion, and hirings. (The manager of our Global Manager Research group is responsible for tracking and compiling this data.)
- Review our website to ensure that it is welcoming to all visitors.