



# **EQUAL OPPORTUNITY AND INCLUSION POLICY**

REISSUED SEPTEMBER 2025

## 1. Equal Opportunity Employment

Employees are hired based solely on specific Company and position requirements as well as the qualifications of each individual candidate.

We will not tolerate nor condone discrimination in any aspect of employment, including, but not limited to, hiring, working conditions, benefits and privileges of employment, compensation, training, appointments for advancement, including layoffs and recalls for all employees, and other terms or conditions of employment. We prohibit discrimination based on an individual's age, race, color, religion, sex, sexual orientation, national origin, physical or mental disability, military and/or veteran status, status as a veteran or special disabled veteran, genetic information, citizenship status, or any other consideration made unlawful by federal, state, or local laws.

We will comply with the spirit and letter of all local, state and national laws pertaining to employment.

Any employee with questions or concerns about equal employment opportunities or who believes they have been discriminated against should bring these issues to their manager or Human Resources as soon as possible so the matter can be investigated and/or addressed promptly.

We further prohibit any form of retaliation against individuals who raise issues of equal employment opportunity.

## 2. Statement on Diversity, Equity, Inclusion and Belonging (DEIB)

At Sodali & Co, our people are the core of the business. Our unique backgrounds, experiences and talents combine to create what makes us a leading provider of strategic advice and shareholder services to clients around the world.

Being a diverse and inclusive organization drives our success and is the foundation of the employee experience we seek to enhance and deliver. We are committed to creating an environment where our differences are not only respected, but valued and celebrated, and where everyone can have a sense of belonging and bring their true selves to work.

As we continue to build our internal initiatives and policies, our DEIB mindset will continue to be embedded in job posting, recruitment, interviewing, and hiring; onboarding and training; compensation and employee benefits; learning and professional development; career progression and promotions; organizational culture and teambuilding activities; and the ongoing development of our hybrid work environment.

Our organizational culture prioritizes:

- **Practicing Inclusive Decision Making:** We believe that diverse perspectives lead to better decisions. By actively seeking input from all team members, we ensure that everyone's voice is heard.
- **Communicating Respectfully and Transparently:** Open communication fosters trust and understanding. We encourage respectful dialogue across all levels of the organization.
- **Leading with Empathy and Respect for Our Colleagues:** Empathy helps us understand each other's experiences and challenges. By treating colleagues with respect, we create a positive work environment.
- **Working Together as One Team:** Collaboration is essential for achieving our goals.