

## *Diversity, Equity, and Inclusion at Chartwell*

Over the course of our 20+ year history, Chartwell's philosophy has been to cultivate an environment of diversity, equality, and inclusion. In our commitment to serving our clients and stakeholders, we understand that we have an ethical responsibility to promote a collaborative environment of equity, fairness, and respect. We believe that attracting and retaining employees who come from a wide range of backgrounds and have different thoughts, opinions, and life experiences, plays a critical role in successfully serving our clients through an objective lens. Our goal is to ensure that Chartwell, as a workplace, creates an equitable and inclusive environment in which our employees feel understood, connected to our culture, and supported in pursuing their own individual goals.

Our Diversity & Inclusion Policy sets the principles that will help Chartwell continue to enhance its DEI efforts across the firm. This applies to Chartwell's recruitment, retention and promotion, compensation and benefits, professional development of our employees, and the general work environment that our employees experience. We believe in full transparency of our ongoing efforts in this area.

The policy focuses on the following key tenets:

 **Our Employees**

Continue to build, retain, and develop our talent pool in a collaborative and connected environment based on equality, fairness, and respect.

 **Our Fiduciary Role**

Chartwell believes that embedding equality, diversity, and inclusion makes us better positioned to attract talent and cultivate more from our employees to meet the needs of our clients. We believe that having an inclusive culture with a diverse group of professionals can lead to creativity, innovation, objectivity, and better reflect the diversity expected by our clients.

 **Our Social Impact**

Continue to promote partnership and philanthropic initiatives that support upward mobility in communities that are most vulnerable.

