

Bringing Diversity, Equity & Inclusion to the Forefront

**Lined Mason, Vice President of Service, Individual Operations,
Ameritas**

The Ameritas Journey

As the charge for diversity, equity and inclusion takes center stage in corporate America, hear what Ameritas has put into practice as part of its ongoing journey to deepen awareness and understanding, foster new levels of inclusion and empower associates to help guide the organization.



2020

- Leadership reaffirmed commitment to inclusive workplace culture and diverse workforce.
- Inclusion and diversity part of business model.
- Fall of 2020 Accelerated supporting efforts, including an Inclusion and Diversity Leadership Council.



Support Within our Home Office

September 2021

Launched associate resource groups for our Home Office associates (ARGs).

- Associate-led groups.
- A safe, inclusive space to share concerns, find support and build connections.



ARGs

Bison Pride (LGBTQ+)



Black and African American
Associates Bison Strong (BAABS)



ARGs cont'd

Ameritas Persons with
Disabilities (PD&A)



Next-Gen Bison (associates new to
their careers)



Support for our Financial Professionals

Ameritas Growth Leaders

- For young professionals in their first 10 years in the industry.
- Monthly meetings and in-person conferences.
- Focused on peer networking, support and mentoring from veteran peers.
- Establish best practices for growth and longevity.
- 50 members in the 2022 cohort.

Diversity and Inclusion Subcommittee

2022 unveiled our new Field Advisory Cabinet subcommittee,
Diversity and Inclusion

Goal

To be more diverse and inclusive in both our financial professionals and the markets we serve. We aspire to create a culture that welcomes all genders, races, cultures and sexual orientation.

How

Outline and develop a path to enhance the **recruitment, training and development** of new and current financial professionals in currently underrepresented and underserved markets.

Diversity and Inclusion Subcommittee Top Priorities

- Create a priority to showcase growing diversity through the inclusion of diverse financial professionals on main stage platform and breakout sessions at gathering events (i.e., Leaders Conference, Ameritas Connection, etc.).
- Gain a greater understanding of the current financial professional field force to track the progress of our diversity and inclusion efforts.
- Identify the primary obstacles to greater advisor diversity.



Ameritas Women Elevated (AWE)

- Ameritas female financial professionals.
- Mentoring and empowering



Ameritas.

WOMEN
ELEVATED

Funding to Support Diversity

Wealth Management Certified Professional (WMCP) scholarship

- For female financial professionals.
- 2021 - \$75k for 24 recipients.
- 2022 - \$25k for 8 recipients.
- Value - \$2,900 per recipient.



Funding to Support Diversity

The American College: Conference for African American Financial Professionals (CAAFFP)

- Silver sponsorship in 2021.
 - 15 complimentary registrations given to our financial professionals.
- Silver sponsorship in 2022.

The Journey Continues ...



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