

# 2024 WORKFORCE DISCLOSURES

## EMPLOYEE DATA

### GENDER BY EMPLOYEE CATEGORY

	EVPs and VPs	AVPs	Manager/Supervisor	All Other Employees
Men	62%	53%	40%	37%
Women	38%	47%	60%	63%

### AGE BY EMPLOYEE CATEGORY

	EVPs and VPs	AVPs	Manager/Supervisor	All Other Employees
Less than 30	0%	0%	1%	14%
30 to 50	40%	58%	70%	63%
Greater than 50	60%	42%	29%	23%

### EMPLOYEE TURNOVER

Age Group	Men		Women	
	Number	%	Number	%
Less than 30	61	0.9%	76	1.1%
30 to 50	201	2.9%	261	3.7%
Greater than 50	35	0.5%	88	1.3%
<b>Total</b>	<b>297</b>	<b>4.3%</b>	<b>425</b>	<b>6.1%</b>

### NEW HIRES

Age Group	Men		Women	
	Number	%	Number	%
Less than 30	146	2.1%	180	2.6%
30 to 50	282	4.0%	454	6.5%
Greater than 50	37	0.6%	60	0.8%
<b>Total</b>	<b>465</b>	<b>6.7%</b>	<b>694</b>	<b>9.9%</b>

## SUMMARY OF BENEFITS

<b>Benefits</b>	<b>Available to permanent employees</b>	<b>Available to temporary employees</b>	<b>Notes</b>
Flex time	Yes	Yes	
Paid personal days	Yes	Yes	
Job sharing	Yes	Yes	<i>Not available to Addenda Capital or Sovereign General employees</i>
Health club on-site/negotiated health club rates	Yes	Yes	
WorkPerks/Employee discounts on insurance	Yes	Yes	
Public transit discount	Yes	Yes	<i>Applies only to employees in major office locations</i>
Employee Assistance Program	Yes	Yes	
Pension Plan	Yes	Yes	<i>Temporary employee participation in the pension plan is subject to conditions</i>
Student Scholarship Program	Yes	No	
Phased retirement	Yes	No	<i>Not available to Addenda Capital employees</i>
Relocation programs	Yes	No	<i>Not available to Addenda Capital or Sovereign General employees</i>
Long-time service awards	Yes	No	
Company share-purchase program	Yes	No	
Paid sick days	Yes	No	
Disability Benefits	Yes	No	
Top-up programs (pregnancy and compassionate care leaves)	Yes	No	

## TOTAL WORKFORCE

Includes full-time and part-time permanent and temporary employees. Totals are based on headcount and include all employees on short-term leave; they do not include retirees, staff on banked vacation prior to retirement, board members, self-employed financial representatives, and employees on long-term disability.

Includes employees of: Carson, Dunlop & Associates Ltd.; CU Agencies Alliance Ltd.; Custodia Group Inc.; Premier group of companies; Smart Employee Benefits Inc.; and The Edge Benefits Inc.

Our HR systems are configured to capture inclusive options (i.e. another gender), however we do not have sufficient data for reporting.

### TOTAL WORKFORCE BY CONTRACT TYPE

	Men	Women	Total
Permanent	2,900	4,584	7,493
Temporary	98	135	234

### TOTAL WORKFORCE BY EMPLOYMENT TYPE

	Men	Women	Total
Full-time	2,958	4,566	7,534
Part-time	40	153	193

### TOTAL WORKFORCE BY PROVINCE AND CONTRACT TYPE\*

Employment Contract	AB	BC	MB	NB	NL	NS	NT	ON	PE	QC	SK
Permanent	784	227	25	628	61	44	2	4,424	1	685	595
Temporary	11	2	1	2	0	2	0	159	0	37	20
<b>Total</b>	<b>795</b>	<b>229</b>	<b>26</b>	<b>630</b>	<b>61</b>	<b>46</b>	<b>2</b>	<b>4,583</b>	<b>1</b>	<b>722</b>	<b>615</b>

\*NPI Group, a subsidiary of Carson, Dunlop & Associates Ltd., has 15 full-time and 2 part-time employees in Nebraska.