

Harris | OakmarkSM

2024

Workforce report



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Letter from the President

I am excited to share our 2024 annual workforce report which showcases the many ways our firm is fostering a dynamic, inclusive, and engaging work environment. Our goal is to create a workplace where every employee feels valued, supported, and empowered to contribute at their highest level. We believe that by cultivating this kind of connected culture, our team will continue to deliver exceptional results for our clients.

Our Employee Resource Groups are led by employee volunteers and continue to offer a variety of opportunities to meet in small groups on topics of interest in a grass roots fashion. Our Employee Experience Group was very active again this year supporting many well-attended events such as Bring Your Child to Work Day, sports events, our community volunteering opportunities, and town halls.

Events like a dynamic session on “belonging” hosted by the Diversity, Equity and Inclusion Council and the Harris Women’s Network quarterly roundtables sparked robust discussions and generated a wealth of ideas regarding how we can create a more connected environment at work. Our ongoing partnerships with Genesys Works and Sport Dans La Ville have provided opportunities to positively impact the next generation of students entering our industry.

Our People Team and Employee Benefits Committee remain dedicated to enhancing the employee experience by continuously adjusting our benefits to ensure they are aligned with our overall commitment to employee excellence.

I encourage you to review our report to gain a deeper understanding of our vibrant workplace which we believe helps support our goal of providing exceptional services and outcomes for our clients.



A handwritten signature in black ink that reads "Christopher W. Keller".

Chris Keller
President and DEI Council Chair

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Diversity, Equity and Inclusion Council

Our vision

Harris' Diversity, Equity and Inclusion (DEI) Council is committed to bringing together individuals whose diverse backgrounds, opinions and perspectives maximize our expertise in finding value and delivering an excellent client experience. Inclusion is embedded in our culture of collaboration, curiosity and openness.

Our mission

People are our most valuable asset. The collective sum of our individual differences, life experiences, knowledge, inventiveness, self-expression, unique capabilities and talent represent a significant part of not just our culture, but our reputation and success. We embrace differences in experience, background and welcome diversity of opinions and thought when making decisions. As such, Harris is committed to cultivating, fostering and preserving a culture of diversity, equity and inclusion.

Overview

The DEI Council was established in January 2019 and is responsible for identifying opportunities to develop, promote and integrate DEI principles throughout the organization. The Council is chaired by the firm's president and is composed of a diverse group of employees who are all committed to ongoing improvements in our DEI efforts. New members are periodically selected through a formal application process, which is open to all employees.



Chris Keller
President and
DEI Council Chair



Joe Alessie
General
Counsel



Jeff Corbin
International
Research



Maggie Curley
Control
Oversight



Meredith Doyle
People



Erin Kopfer
People



Anand Krishnakumar
Investment
Technology



Jim Lowery
Marketing and
Client Relations



Liam McGarrity
Investment
Research



Gunnar Moll
Performance
Analytics



Rana Wright
Chief Legal and
Administrative Officer

Setting a foundation by defining DEI at Harris

DIVERSITY

Diversity is the amalgamation of qualities that makes every individual unique: characteristics, experiences, cultures, perspectives and cognitive approaches.

EQUITY

Equity is ensuring that policies and processes are impartial and fair and provide just outcomes that acknowledge and respect every employee's unique individual needs and goals.

INCLUSION

Inclusion is fostering an environment where each individual feels welcomed, respected, valued, supported and encouraged to bring their authentic self to work.

Initiatives: Enhancing talent acquisition

Harris' most valuable asset is its people—and the firm's continued success is dependent on accessing the best individuals in the marketplace. The firm's talent acquisition strategy illustrates our commitment to fostering an inclusive workplace, which positively impacts the value provided to clients.

Talent acquisition processes

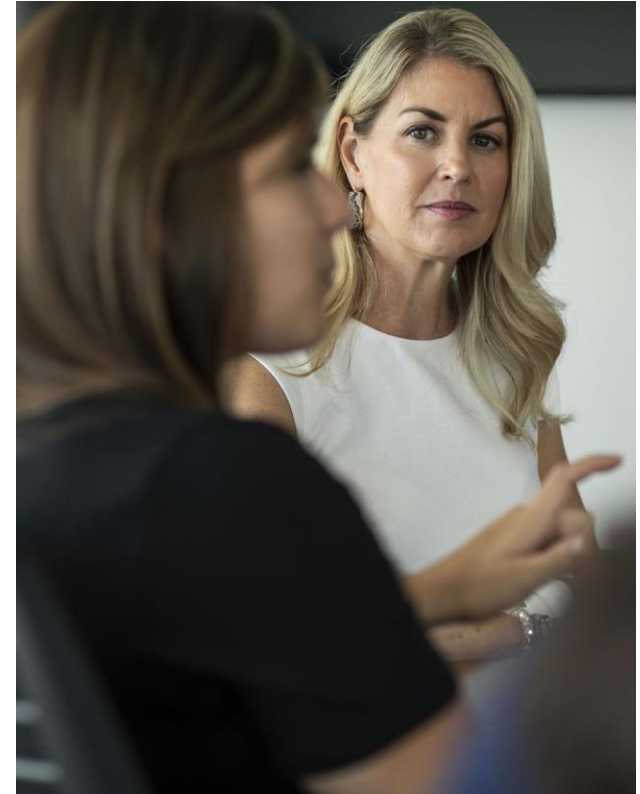
Harris utilizes Greenhouse Recruiting, an applicant tracking system that helps with hiring goals by:

- Allowing candidates to submit recorded name pronunciation and indicate personal pronouns
- Helping further minimize any potential for unconscious bias by leveraging consistent candidate scorecards
- Reinforcing inclusive behaviors throughout the hiring process, including purposeful language in job postings and related hiring documentation

Talent pools

The firm continually evaluates diverse organization partnerships, sponsorship opportunities, and early career and internship recruitment efforts to expand talent pools. In 2024, Harris leveraged the following partnerships:

- CFA Institute
- Genesys Works
- Investment Advisor Association (IAA)
- 100 Women in Finance
- Sponsorship of university stock pitch competitions (i.e., Women in Investing Conference – undergrad and M.B.A. programs)



Initiatives: Pursuing equity

Catalyst Program

Catalyst is a sponsorship program designed to improve senior-level equality, cultivating the firm's existing pipeline of high-performing women. Catalyst pairs women at the senior director level and above with a partner of the firm outside of their business line to build a long-term sponsorship relationship. The program is accessible to 100% of women at the senior director level and above. The sponsor's role is to advocate for, and amplify, the work being performed that is directly attributing positively to the client experience.

Pay equity review

To support the firm's pay-for-performance compensation philosophy, Harris conducts annual compensation reviews to assess pay equity, including, but not limited to, reviewing this information by age, gender and race/ethnicity. We take into account a number of factors that are part of our "bottom-up" review: job factors, external conditions and peer data, which all form part of our review of year-end compensation awards before they are finalized.

Harris adheres to various local pay equity regulations, such as Illinois Equal Pay and the newer 2025 Illinois Pay Transparency, for our job posting total rewards disclosures.

Spotlight: Catalyst Pair



Catalyst created an opportunity for two-way information sharing that might not have happened otherwise. Colin provides partner-level insights to support my career growth and development, and I offer perspective on client trends, distribution initiatives and individual project work.

- Lauren Digani
Institutional Client Service Manager



The program has provided a great opportunity to get to know Lauren better and to hear her perspectives on the exciting changes happening in Distribution. These interactions also provide valuable opportunities to discuss how different departments can work more collaboratively.

- Colin Hudson
Portfolio Manager

Initiatives: Continuous learning and development

DIVERSITY

EQUITY

INCLUSION

BELONGING

Open-Invite Roundtable Discussion

The DEI Council sponsored roundtable discussions on core principles, honing specifically on the principle of **belonging**.

To begin each session, participants watched a video where Pat Wadors, chief people officer at UKG, describe how belonging emphasizes the creation of an environment where individuals feel valued and authentically themselves.



“Facilitating a session on 'Belonging' allowed me to not only share some experiences I’ve learned throughout my career, but more interestingly, the responses of the participants showed active engagement, and their feedback was thoughtful so everyone took something away from this session.”

- Colin McFarland
Chief Compliance Officer Emeritus

Initiatives: Strong partnerships

Genesys Works Program

In 2023, Harris launched a new partnership with Genesys Works. This program pairs two high school students with the firm in a part-time, one-year internship during their school year to learn about working in a corporate environment and the asset management industry.

“My Harris | Oakmark internship was a highlight of my senior year. The experience provided valuable insight into corporate life, mentorship from successful professionals, and motivation to pursue a career in a similarly positive and rewarding environment. I am very grateful for my time and opportunities at Harris.”

- Morgan P. , Genesys Works Program 2024 Intern

Spotlight: Genesys Works Program 2024 interns



LARRY K.
Technology and Digital Solutions



MORGAN V. P.
People Team

Genesys Works is a not-for-profit organization that partners high school students in underserved communities to major corporations through meaningful internships. Once students successfully complete a skills training course, they are matched to a paid, yearlong internship at a partner company where they participate in 20-hr workweeks while in school. Throughout their internship they gain market-ready technical skills and receive guidance and planning relevant to their future career path.

Initiatives: Supporting employee resource groups

The firm invites employees to build employee resource groups (ERGs) to foster inclusive communities around shared identities or experiences. ERGs develop goals and strategies independently and can use a variety of methods to cultivate advocacy, community, inclusion, education and cultural competency.

Valuable Minds

Valuable Minds promotes mental health activities with the intent to:

- Create spaces that have a positive intent and mindset
- Offer programming teaching skills that promote healthy behaviors and self-care
- Raise awareness about mental health challenges that are often not observable
- Support inclusion for employees who are impacted directly or indirectly by mental health and normalize it in Harris conversations

This year, VM ERG hosted:

- A twenty-minute workday walk along the Chicago River to help employees clear their minds and start the afternoon fresh.
- A group discussion about empathy in the workplace.

Valuable Minds events are open to all employees.



EMPLOYEE LEADS

Stanton Anderson

Front Office Operations

Young Lee

Chief Operating Officer

EXECUTIVE SPONSOR

Mike Mangan

Partner and Portfolio Manager



Initiatives: Supporting employee resource groups

Harris Women's Network (HWN)

HWN's mission is to foster the professional development and advancement of women at Harris.

International Women's Day (IWD)

HWN hosted an IWD workshop that invited Harris employees and industry guests to celebrate IWD and promote last year's theme of "Inspire Inclusion". The workshop and a separate firm-wide lunch featured catering from local women-owned businesses. In addition, HWN produced a special IWD Publication highlighting inclusion at Harris.

Roundtables

HWN sponsored quarterly roundtables focused on professional development. Participants read a series of articles and participated in a group discussion. Topics included office housework, mentorship, use of qualifiers and asking for what you want.

External partnerships and donations

Members of HWN's leadership team attended a conference for women across the Natixis affiliate network. Additionally, HWN partnered with Chicago-based Women Investment Professionals to plan members-only events and secure sponsorship status for Harris | Oakmark. HWN concluded the year by collecting in-kind donations for Sarah's Circle, a nonprofit organization serving women who are homeless or in need of a safe space in Chicago.

EMPLOYEE LEADS

Lauren Digani

Marketing and Client Relations

Kristina Becker

Legal

Jen Burka

Middle Office Operations

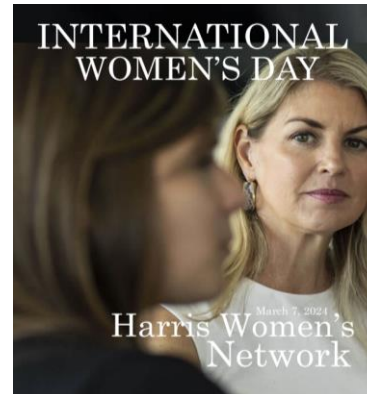
Katie Schueller

Marketing and Client Relations

EXECUTIVE SPONSOR

Tony Coniaris

Partner, Chairman and
Portfolio Manager



Initiatives: Supporting employee resource groups

Jewish Employee Resource Group

The group aims to provide Jewish employees and their allies with a space to share their core Jewish values, to support the celebration/observance of Jewish holidays, to experience Jewish life through each other's stories as well as a place for non-Jewish employees to learn what Judaism is all about.

In 2024, the Jewish Employee Resource Group sponsored the following activities:

- Annual Hanukkah Party
- Illinois Holocaust Museum Private Tour
- Apples & Honey for Rosh Hashana
- Hamantaschen for Purim
- Matzah for Passover

EMPLOYEE LEADS

Emily Neumark

Private Wealth Management

Emma Zisook

Senior Marketing Operations
Coordinator

EXECUTIVE SPONSOR

Robert Bierig

Partner and Portfolio
Manager



Initiatives: Engaging with the community

Volunteer time off

Harris encourages employees to participate in meaningful volunteer activities in local communities by providing paid volunteer time off (VTO).

Harris Days of Service

Harris Days of Service is meant to broaden employees' volunteer offerings with the following quarterly outings:



- Mercy Home (Q1): Youth tutoring and job skills seminar



- Habitat for Humanity (Q2): New construction or remodel build site



- Lincoln Park Zoo (Q3): Gardening at the Zoo and Nature Boardwalk



- Greater Chicago Food Depository (Q4): Food repack session



Lincoln Park Zoo



Habitat for Humanity



Greater Chicago Food Depository

Initiatives: Engaging with the community

Harris partnered with Natixis again in 2024 to host a new group of students from the Young Talents Program of Sport Dans La Ville in France. The organization works with young adults in underserved areas of the country to provide access to an English academy along with stays and professional opportunities abroad.



2024 Sport Dans La Ville Young Talents Program students



Spotlight: Speed Networking Event

Harris further introduced the students to the investment management field and different career paths within it. The students engaged in a speed-networking event which allowed them to connect with employees of all levels in a variety of different departments



Inclusive culture

Core competencies

Inclusion is one of seven core competencies considered during the performance management process. Expectations for all core competencies increase as employees progress in their careers at Harris.

ANALYTICAL THINKING

BUSINESS ACUMEN

CLIENT SERVICE EXCELLENCE

COMMUNICATION

INCLUSION

INITIATIVE

REPUTATIONAL CARE

INCLUSION COMPETENCY

- Promotes an inclusive and respectful working environment
- Seeks diverse perspectives and works collaboratively
- Actively shares information with others and makes themselves available to do the same

BY CAREER LEVEL

- **Senior and executive director:** Creates opportunities for teams to work together to build an inclusive organizational environment
- **Senior associate through vice president:** Recognizes others' contributions and encourages further partnership by proactively seeking collaboration
- **Analyst and associate:** Offers to help others and willingly accepts help from colleagues

DEI Council Observations Program

During 2024, Harris observed and celebrated the following events:

- Black History Month
- Women's History and International Women's Day
- Asian American and Pacific Islander Heritage Month
- Pride Month
- Hispanic Heritage Month
- Native American Heritage Month

Inclusive culture

Employee Experience Group

The Employee Experience Group (EEG) is an employee-led team that advises executive leadership and works closely with senior management to provide input into the firm's engagement efforts. Members are committed to identifying, recommending and implementing improvements to foster engagement and enhance the culture at Harris.

In 2024, EEG hosted the following events and programs:

- Firm-wide Town Halls
- Peer Recognition Program
- March Madness bracket competition
- Bring Your Child to Work Day
- Pickle ball tournament
- Intrafirm softball game spectator event
- Golf scramble
- 3-on-3 basketball tournament
- America Scores Soccer Cup Team
- Speaker Series
- Cookie exchange
- Lincoln Park ZooLights employee tickets



Firm-wide Town Halls



Bring Your Child to Work Day



Golf scramble

EEG MEMBERS

Diana Augustyniak

Marketing & Client Relations

Elle Cramer

Intermediary and Product Group

Lucy Grant

People

Tim Hanson

Technology and Digital Solutions

Jessie Nowicki

Portfolio Implementation

Corina Paros

Accounting

John Scarnavack

Technology and Digital Solutions

EXECUTIVE SPONSORS

Joe Allesie

General Counsel

Zack Weber

Chief Financial Officer

Inclusive benefits and mental health resources

Harris believes in supporting a balanced lifestyle and providing employees with opportunities to thrive in both their personal and professional lives. In addition to a robust health and wealth benefits package, the firm offers the following benefits:

Inclusive benefits

- Paid parental leave: New parents, regardless of gender, may take up to 16 weeks of leave to bond with their newborn, newly adopted or foster child.
- Family planning expenses: Employees can be reimbursed for eligible adoption-related and surrogacy-related expenses.
- Cryopreservation: Employees are eligible to retrieve, freeze, and store eggs and sperm without an infertility diagnosis.
- Family support: Employees have access to subsidized back-up child, adult and eldercare as well as resources for nannies, sitters, eldercare and pet sitters.
- Health and wellness: Employees are offered a complimentary membership to an onsite fitness facility as well as a wellness reimbursement account for which they can earn additional funds throughout the year.
- Vaccinations and screenings: Onsite flu vaccines and biometric screenings are offered to employees and eligible dependents.

Mental health resources

- BCBS MDLive: Virtual behavioral health care, including therapy and psychiatry is available on BCBS's telemedicine offering, MDLive, and is included in both medical plans
- Lyra: Employees have access to Lyra, a mental health provider. The network connects employees with mental health support, including therapy, counseling, crisis support, manager training and more outside of medical insurance.
- Calm app: Premium subscription, which improves well-being by promoting better sleep, reducing stress and anxiety, and developing more mindfulness.
- Employee assistance program: Employees and their families have access to a licensed professional counselor to help with several areas including work/life balance, childcare and eldercare resources.

WELLNESS CHAMPIONS

The Wellness Champions are employees passionate about cultivating health and well-being at Harris. They partner with the People Team to plan activities and challenges, which focus on holistic health. Wellness activities are centered around gratitude, movement, reading, eating well and self-care.



EMPLOYEE LEADS

Melanie Hannon
International Research

Jackie Thompson
Domestic Research

Kim Majka
Executive Office

Jamie Volheim
Compliance

Madeline Polinski
People Team

Emily Weisheit
Compliance

Jose Ramirez
Account Services

Kate Shearer
People Team