



2023 DE&I PRACTICES



Committed | Adaptable | Growth Minded | Caring

Diversity

- We are an **Equal Opportunity Employer**. Mission Wealth hires without regard to age, race, color, national origin, gender (including pregnancy, childbirth or medical condition related to pregnancy or childbirth), gender identity or expression, religion, physical or mental disability, medical condition, legally protected genetic information, marital status, veteran status, military status, sexual orientation or any other factor.
- Our **Community Impact Program** continues to increase our impact through both sponsorships and community involvement with a diverse selection of organizations across the nation. Our firm's primary charitable focus is to support organizations in Environmental, Health and Human Services and Education/Youth Development.
- We provide **Employee Diversity Training** to encourage our team to learn about the importance of specific holidays, through diversity campaigns on the Sustainable Future Platform and through mandatory online courses. The online training is provided annually to all employees and addresses important issues around diversity in the workplace.



Equity

- Mission Wealth defines a clear **career path** for each department through our “Diamond Team” model.
- Employees are eligible to participate in a **Path to Partner** program, where they can contribute to the evolution of our firm and our industry. Currently, our 15-member partner group encompasses a diverse group of both men and women, and is continually expanding to client advisors and key support personnel.
- Mission Wealth ensures **people’s talents are recognized** through promotion, bonus structure and various leadership opportunities.
- We are transparent with a **competitive compensation and bonus structure**. We are proud to offer consistent compensation across different geographic locations.
- All team members are eligible for **free financial planning and advising** through our firm.
- We offer internal specialized training programs, including:
 - **Accelerated Advisor Program**
 - **Mentorship Program**
 - **Continued Education Reimbursement**



Inclusion

- Mission Wealth values **open feedback**, so we hold employee huddles and reviews routinely and as requested by employees.
- We send our team different **surveys** each year, covering various topics around personal satisfaction, opinions on our processes and services, culture and additional topics. We share those results as a team, collaborate and actively make changes to improve.
- Our **Executive Committee** consists of men and women with different perspectives, backgrounds and opinions.
- We **recruit, develop and retain the talent** needed to meet business objectives, while targeting highly qualified individuals that represent diverse communities and backgrounds.
- Our **Diversity and Inclusion Committee** is open to all employees and meets once a month to ensure Mission Wealth continues our mission to be a best place to work for with a sole focus on diversity and inclusion.
- Employees can take part in different **Affinity Groups**, including Women on a Mission, Men on a Mission, Mission Book Club, Fitness Club, Cooking Club, Gardening Club, and coming soon, a Young Professionals on a Mission group.
- We offer free **INSPIREDtalks** to the public and Mission Wealth employees, four times a year, where diverse and professional speakers present on a number of insightful topics. **LEARN MORE**
- Employees at Mission Wealth are encouraged to champion **philanthropic causes** that are diversified and important to them; every employee is offered Paid Volunteer Time Off, as well as dollar-matching opportunities through Mission Wealth.
- We have **opened up hiring to national locations** to achieve a more diverse team and offer a 100% remote working option for most positions. Currently we have an 89% **distributed workforce** across the nation.
- We provide pro bono financial services to at-risk communities through the **Foundation for Financial Planning Opportunities**. Through our financial planning process, we help individuals in financial crisis, people with cancer, low-income communities, veterans and military members and those severely impacted by 2020.
- To keep our **culture strong and inclusive**, we hold retreats every year to connect as a team. These multiday programs include facilitated ice-breaker exercises to develop deep ties, shared vulnerability and a personal appreciation for each valued company member, with fun activities highlighting the distinct culture of the retreat location.

