

Turning Point Diversity, Equity & Inclusion Charter

Vision

Turning Point values the diversity of backgrounds that employees bring to our workplace. We strive to foster an environment that is culturally competent and supports equity of treatment both internally and externally between people of diverse backgrounds, including but not limited to race, ethnicity, gender, age, ability, sexual orientation, and religion.

We seek to recognize historical inequities and to create action to cultivate a more inclusive and just community.

Responsibilities

Turning Point expects all employees to help cultivate a diverse and inclusive culture. The Turning Point Diversity, Equity & Inclusion Committee will serve as a guide, with the responsibility to:

- + Create opportunities for inclusive dialogue and learning with the intent to better understand and value the diversity of backgrounds each person lends to the workplace;
- + Foster opportunity for feedback between Turning Point management and employees, including discussion of company policies and implementation of meaningful action;
- + Identify opportunities for employees to volunteer, donate, or otherwise support organizations that prioritize equity and social justice in the greater Seattle community;
- + Assess and adjust goals, policies, and practices within the firm to build an approach to diversity and inclusion that is sustainable, meaningful, and just.

Commitments

Turning Point, as part of our vision, commits to setting annual goals related to the following areas:

- + Work with Minority- and Women-owned businesses to foster equity in access to financial industry knowledge and resources;
- + Offering paid volunteer time for each employee, which may be used at opportunities identified by either the firm or by the employee;
- + Firm matching of employee donations to not-for-profit organizations;
- + Learning opportunities such as trainings, seminars, readings, and workshops that contribute to cultural competency and informed action.

Accountability

Turning Point management and employees will hold ourselves accountable for our responsibilities and commitments in the Charter. The Committee will actively assess progress towards our goals and will report their activity at Quarterly All-Hands meetings. The Committee will circulate an annual survey to employees to help assess progress by the Committee and the Firm and to determine opportunities for improvement.

Donation Matching

As part of Turning Point's commitment to Diversity, Equity, and Inclusion, the firm encourages all employees to donate to an organization of their choosing that supports the vision of this charter. The firm will match the employee's donation, up to \$250 per year per employee.

To participate in the firm donation match, submit your donation receipt to Lieu and cc Diversity@Turning-Point.com. Turning Point will accumulate all donations throughout the year and match the donations in December each year.

The Committee will also select one organization every year to highlight as a potential recipient of donations to help guide employee donations towards organizations that support the vision of this charter.

Paid Volunteer Time

Turning Point offers employees 16 hours per year to be used for volunteering with a non-profit organization. We prioritize volunteering at organizations that support Black, Indigenous, People of Color (BIPOC) and historically disadvantaged communities with a focus on equity and social justice.

Turning Point will offer opportunities throughout the year to volunteer together and encourages employees to join their coworkers on these days. If employees are not able to attend these events, the hours may be used at an organization of their choice.

SMART Goals – FY2021

Turning Point is committed to setting goals that are Specific, Measurable, Achievable, Realistic, and Timely. This section of the charter is to be updated annually in December to set goals and reviewed often to assess progress.

For the year of 2021, Turning Point has set the following goals related to Diversity, Equity, and Inclusion:

- + Provide pro bono Financial Services (Controller, CFO services) to 2 or more Minority- or Women-owned businesses.
- + Contribute at least 80% of employee paid volunteer time towards work with the community. The Committee will plan and implement at least 2 firm-wide volunteer events to provide opportunities for employees to use their volunteer hours.
- + Match every employee donation made throughout the year in December, up to the annual maximum of \$250 per employee.
- + Offer 2 or more trainings or workshops to employees that contribute to learning around cultural competency and informed action.
- + Hold quarterly All-Hands meetings to assess progress towards our goals, provide opportunities for feedback, and implement changes.