

Diversity, Equity & Inclusion Study

Recommended by Mortgage Bankers Association

KEY DATES

- ▶ **July-September**
Survey Launch
Data Collection Sheets
Distributed
- ▶ **September 17th**
Data Collection Due
- ▶ **Late September**
Data Cleaning / Questions
- ▶ **October**
Survey Results Delivered
- ▶ **Late October**
Participant Webinar

CONTACT INFORMATION

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STUDY REPORT

The purpose of this study is to provide information on diversity statistics across various functions and job levels within the Commercial and Residential real estate finance industries. Please provide your firm's ethnic group profile, gender, diversity policies and practices for US-based employees as of June 30th, 2021.

The questionnaire covers elements specific to DE&I initiatives including:

- Policies and Governance
- Recruitment initiatives
- Talent and Training initiatives
- Groups, Networks and Forums

Though the report won't list participating firm names, the study results will include scoping factors such as :

- # of Employees
- Production Volume
- Servicing Portfolio Size

The study will also provide statistical analysis across gender and race categories within the following areas:

- Executive Management
- Origination – Sales
- Origination – Underwriting / Operations
- Servicing / Default
- Infrastructure / Corporate Admin
- EEO-1 Job Classification (as provided by US Equal Employment Opportunity Commission)

Confidentiality Reports are presented in a way that ensures that data on individual companies cannot be identified; and are distributed only to participating organizations, each of which signs a reciprocal Services Agreement with McLagan.

CONSULTING & ADVISORY

McLagan, a division of Aon PLC, is part of the leading Human Capital consulting and benchmarking firm for the financial services industry. Established in 1967, McLagan's financial services industry focus allows us to provide clients with a wealth of relevant fact-based knowledge and extensive hands-on experience supported by proprietary market data.

Our consulting capabilities include functional executive and broad-based benchmarking, pay and performance analysis, job architecture/career framework, incentive plan review and design, geographic cost to market analysis and custom market practice studies.

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PARTICIPATION FORM

The firm designated below agrees to participate in and purchase the 2021 Diversity, Equity & Inclusion study.

All McLagan products are for internal use only and a signed mutual Services Agreement must be received prior to delivery of the results. All data is treated as confidential and reported only in aggregate form for the market data.

PARTICIPATION FEES

Please check each of the product(s) that your firm is committing to participating in and subsequently purchasing. Please check the appropriate product fee based on your firm's MBA membership status.

Product	2021 Participation	
	MBA Members*	Non- Members
Residential Real Estate Finance Diversity, Equity & Inclusion Study	<input type="checkbox"/> \$1,500	<input type="checkbox"/> \$2,500
Commercial / Multifamily Real Estate Finance Diversity, Equity & Inclusion Study	<input type="checkbox"/> \$1,500	<input type="checkbox"/> \$2,500

**Please note that McLagan will confirm membership with the MBA. The studies are independent from each other, and a firm must commit to participating and paying the study fee to obtain results.*

PARTICIPATION AGREEMENT

PRIMARY DATA CONTACT

The individual identified below will act as the primary data contact for completion of all survey, study or analysis information and has the authority to release all necessary data to McLagan. In addition, this individual will be responsible for returning a fully executed Services Agreement with McLagan prior to the release of any study results.

Name: _____ Title: _____
 Company: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Email: _____ Phone: _____

BILLING CONTACT *(if different from Primary Data Contact)*

Name: _____ Title: _____
 Company: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Email: _____ Phone: _____

Signature: _____

Please sign and email this form to dave.rosenthal@mclagan.com Thank You.