



BENEFITS SUMMARY | 2023

MEDICAL, DENTAL & VISION



C.A. offers medical, dental, and vision coverage to full time employees who work an average of 30 hours or more per week. Your spouse, domestic partner, and/or children under age 26 are all eligible for coverage.

Choose between two medical plan options: a PPO and a standard HDHP. Both plans offer 100% coverage for preventative care and let you choose from a network of healthcare providers. Dental and Vision coverage are also available.

TIME AWAY FROM WORK



Eligible Employees are provided the following time away from work:

- Paid Time Off (PTO) - Whether full-time or part-time, PTO accrual will begin with your first paycheck.
- Betterment Days - Full-time employees may take up to 15 hours of paid time off each year to be used in the spirit of service and volunteerism; part-time employees may take up to 7.5 hours.
- Holidays - Eligible employees receive 11 paid holidays per calendar year.

401(k)

Save for a comfortable retirement with C.A.'s 401(k) Plan, administered by Vanguard.

Key features of the plan include:

- Whether full-time or part-time, Employees can begin to contribute following 30 days of employment.
- Each year, C.A. will match your contribution 25% up to a max of 10% of your elective deferral.
- Individual contributions are always 100% vested. C.A.'s contributions are 100% vested after five years of service.
- You also have the option to make after- tax Roth 401(k) contributions.



SUMMER HOURS



Full-time employees are permitted to leave early on Fridays during defined summer months (Memorial Day to Labor Day).



LIFE INSURANCE

C.A. pays 100% of the cost of basic life and accidental death and dismemberment (AD&D) insurance. The benefit is a flat \$50,000. You may choose to pay for additional coverage for yourself and your dependents.

HSA & FSA's



For those who elect the HDHP, a health savings account (HSA) allows you to set aside pre-tax funds to help cover qualified healthcare expenses up to IRS limits. C.A. contributes up to \$500 for individual coverage and up to \$750 for family coverage.

Healthcare and dependent flexible spending accounts (FSAs) allow you to set aside pre-tax funds to help cover qualified care and dependent care expenses not covered by insurance.



ACCIDENTAL & CRITICAL ILLNESS

Employees may purchase additional coverage to supplement their medical coverage. These policies are paid through payroll deduction and completely portable.

- Accident: Helps cover expenses related to off-the-job accidents and injuries.
- Critical Illness: Helps cover expenses related to a critical illness or event; can be used to supplement disability payments and out-of-pocket medical expenses.



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PARENTAL LEAVE



C.A. provides paid leave for all parents (biological, surrogate, adoptive) regardless of gender.

- Full-time employees with at least 6 months of tenure are eligible for up to 12 weeks of paid leave during which they will receive 100% base salary continuation.
- Full-time employees with 3-6 months of tenure may choose from the following:
 - Up to 6 weeks at 100% base salary
 - Up to 9 weeks at 75% base salary
 - Up to 12 weeks at 50% base salary

Please note: The Parental Leave program requires participants to remain employed for at least 6 months after they return to work. If participants voluntarily leave the organization or are terminated for cause, they must reimburse the organization 50% of their parental leave.



NORTON LIFELOCK ID THEFT

Help protect your identity and devices with Norton LifeLock Benefit Plans. C.A. offers two plans to choose from and policies are paid through payroll deduction.

PET INSURANCE

C.A. offers the ability to obtain a payroll deducted pet insurance option from Nationwide. Nationwide pet insurance helps you cover veterinary expenses so you can provide your pets with the best care possible without worrying about the cost. Get cash back on eligible vet bills and use any vet, anywhere!



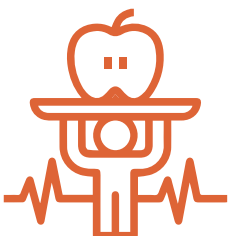
SHORT- & LONG-TERM DISABILITY

C.A. offers both short term and long-term disability if you are unable to work due to a non-work-related illness or injury. The following highlights key features:

- Short Term Disability (STD): Benefits are paid up to 60% of the employee's base rate of pay for a maximum of 26 weeks.
- Long Term Disability (LTD): If you are disabled for more than 180 days, you are eligible for LTD benefits. The benefit pays 60% of your monthly covered payroll up to \$5,000 per month.

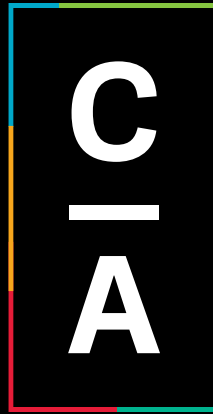
UNPAID LEAVE OF ABSENCE

Pursuant to the Family and Medical Leave Act (FMLA), C.A. offers eligible employees time off, up to 12 weeks, work due to a serious injury, illness or disability to care for a family member or as the result of a birth, military duty and other personal reasons.



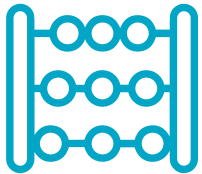
HEALTH AND WELLBEING

With C.A.'s suite of free wellbeing tools and resources through our medical plan, you can get support for a number of wellness goals like access to a 24/7 Nurseline, quitting tobacco, managing pain, losing weight, women's and family health and more.



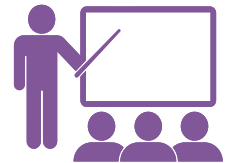
SOFT BENEFITS GUIDE

What else does C.A. offer you?



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Our Approach to Compensation

At C.A., we take a Total Rewards approach with our benefits in an effort to ensure employees are not only fairly compensated, but they are also feeling like they are being holistically valued during their time here. Outside of traditional benefits and compensation, we want our employees to have the opportunities for growth, both professionally and personally.



CASH COMPENSATION

Base Salary
Annual Bonus Program
Special Incentives, SPIFFS,
Client Funded Bonuses
Allowances



BENEFITS

Medical, Dental, Vision
Retirement Match
Life Insurance and AD&D
Disability
EAP



WORK LIFE BLEND

Work Environment
Paid Time Off
Flexible Work
Betterment Time
Summer Fridays



PERFORMANCE MANAGEMENT

Goal setting
Bi-Annual Performance
Reviews



TALENT DEVELOPMENT

Promotion Opportunities
All Hands Learning
People Leadership Learning



RECOGNITION

Values in Action
Employee Referral Bonus
Employee Spotlights

We also strive to be transparent with the decisions we make to foster employee trust. Part of that transparency is in how we make decisions on compensation within our organization. Here are the four guiding principles we follow:

- **Reward** employees for remarkable individual and organization performance
- **Drive Actions** that improve profitability and align employees interested with those of the organization's stakeholders
- Ensure that compensation is **Reasonable and Competitive**
- **Attract and Retain** talented and highly skilled employees committed to overall C.A. success

Soft Benefits

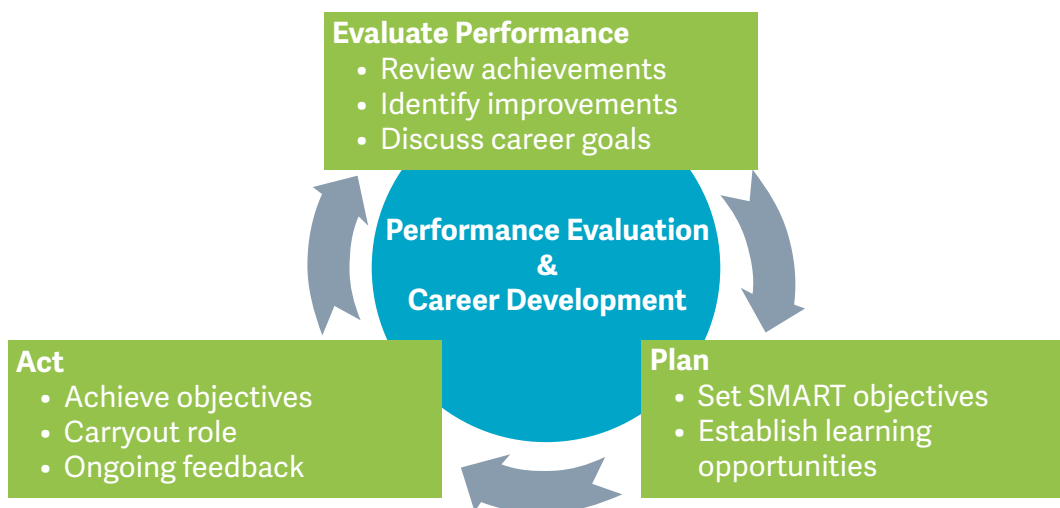
Keeping Total Rewards top of mind, we want to highlight our benefits outside of the conventional benefits package that we offer within C.A. We have broken them into smaller categories to show some of the intentionality that we considered when extending these benefits to our employees.

Some of these benefits will be exclusive to C.A. Fortune and will be clearly marked with *asterisks* to avoid confusion.

Career Development

Managers at C.A provide formal reviews to evaluate past performance of our employees in order to enable future performance and growth. Performance Reviews occur on a regular cadence: annually for Carlin employees & bi-annually for Fortune employees.

These formal discussions around performance and growth opportunities are paired with the practice of real-time feedback and regular 1:1 meetings to ensure ongoing collaboration between employees and their managers. We believe feedback is to be bidirectional and happening regularly.



During your end of year performance review, you can expect the self-assessment question of: ***“What are your career aspirations? What are you interested in learning more about to move closer to your next career goal?”*** to facilitate conversation about your future. Managers are also tasked with defining next steps for your career and development activities that support your goal achievement.

Community

Here at C.A., we understand the importance of having a sense of belonging. That is why we want to do what we can for employees to engage in community activities both internally and externally. Everyone should feel like they're making an impact. Here are some of the ways to get involved:

Betterment Days: 2 fully paid days outside of standard PTO to all of C.A. in the spirit of service and volunteerism. Some ways you can choose to use these days:

- Volunteer at your child's school
- Get involved with a cause that you're passionate about
- Participate in a project to uplift the community you live in

***Giving Day*:** This is an annual fundraising event where C.A. Fortune chooses one cause to support company wide. We drive funds, get our hands dirty, put in some sweat equity, and have fun alongside each other!

***Employee Resource Groups (ERGs)*:** We have a few internal groups within C.A. Fortune to support community and to help move good change internally. Reach out to peopleteam@cafortune.com to join!

Community Engagement Council

created to provide fun ways to connect with each other as a team and engage with our local communities to drive innovative and lasting impact.

DEI Committee

a cross-functional team of employees who collaborate to recommend and implement meaningful action

Book Club

a group that meets quarterly for thoughtful conversations on a variety of topics and books

Social Committee

aims to create a fun energy through events that are inclusive of both in-person and remote employees

Flexibility

To help ensure more workplace cohesion, we do have core hours from 9:30a – 3:30p local time but overall, your work schedule is flexible! Go for a quick stroll to clear your head, leave to pick-up your kids from school; just be sure you keep your team in-the-loop. We also encourage open communication with your manager in general! They can always help find solutions with you, should nuanced situations arise.

Here are some other ways we encourage flexibility for our employees:

- **Hybrid work environment:** For those based out of an office, we ask you to be in-office on Tuesdays and Thursdays. Outside of that, employees can choose to work from home. As long as you're doing good work, we don't care where you do it.
- **Summer Fridays (memorial – labor day):** This is an [optional program](#) we offer to allow employees to take half-days on Friday; enjoy a longer weekend!
- ***Fortune's HQ is Pet Friendly*:** If you're at the Chicago office and [want to bring your pet](#) along for the ride, reach out to Sandra Gonzalez, our Office Manager, for scheduling!

Family Friendly

C.A. is big on collaboration and creating a cohesive work environment which is what makes us a force to be reckoned with. All this to say...we are a strong team that honors time away from work. We value the families of our employees and want to show it.

To celebrate this, we have 3 great programs for anyone looking to grow their family (biological, surrogate, adoptive) while working at C.A.:

Parental Leave	Welcome Back Program	Milk Stork
<p>For employees with 6 months of tenure, we offer 12 weeks of fully paid leave.</p> <p>For employees with 3-6 months of tenure, we offer a condensed plan with a few tiers to choose from.</p> <p>Check out all the details of our policy here!</p>	<p>Employees may elect to work a reduced schedule of 30 hours per week at 75% pay for the 4-weeks following their parental leave.</p> <p>We recommend you pick one day a week to take off as opposed to leaving early every day if you choose to participate.</p>	<p>This program is provided to career moms, so they can ship their breast milk home to their baby when they are traveling for business.</p> <p>Milk Stork® Breast Milk Shipping and Mom-Made Products</p>

Total Well-Being

As modeled in our Total Rewards approach to compensation, we hope you can see how C.A. supports you holistically as a member of our team. With that in mind, here are some additional benefits and resources that we offer to help take care of your mental, physical, and financial health.

5-minute Meditation

This is led by Alissa Monteleone weekly. It is a quick meeting for everyone to (virtually) gather and take the time to sit in meditation or self-reflection. The shared silence can be intimidating to some but becomes very grounding if you give it the chance! Reach out to peopleteam@cafortune.com, so we can forward you the link.

Fitness Program through BlueCross

If you're enrolled in our BlueCross BlueShield Medical insurance, you are eligible to enroll. The Fitness Program offers:

- Flexible gym membership: options range from \$19 to \$99
- Access to a nationwide network of participating facilities so members can workout anywhere
- If going out isn't your forte, there's also access to digital fitness options
- To enroll: you can log into their "Blue Access for Members" account, go under the "wellness" tab, choose "Fitness Program" then select the plan and location that best meets your needs OR call 888.762.2583.

401(k) Education

C.A.'s Financial Advisors, Flynn Financial, offers free 30-minute one-on-one 401(k) education consultations to help with retirement planning & investment education. You can also use this time to ask questions personal to your financial situation.

To schedule your 1:1 401(k) education consultation, please contact Joe Pigot Jr. via email at Joejr@f2partner.com or via phone at 212.490.4580

Employee Assistance Program (EAP)

Free to sign-up, 24/7 availability, & confidential with up to 3 sessions free of cost, this is a resource to utilize. After your free sessions, prices start as low as \$15. [Sign-up](#) before you need it! It's more than counseling, our EAP also helps with:

- Legal or financial consultations
- Family, relationship, & parenting
- Child & elder care needs
- Emotional and stress-related issues
- Conflicts at work or home
- Substance abuse problems