



## VERSUS IS AN EARLY SIGNATORY OF THE DIVERSITY, EQUITY, AND INCLUSION CODE OF THE CHARTERED FINANCIAL ANALYST INSTITUTE

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**SEATTLE, WA – July 11, 2022** – Continuing its advocacy in the areas of diversity, equity and inclusion, Verus announced today that it is an early signatory to the Chartered Financial Analyst Institute’s (CFA) Diversity, Equity, and Inclusion Code (DEI Code) for the investment profession in the United States and Canada.

According to Verus Chief Executive Officer Jeffrey MacLean, “The DEI Code provides an actionable framework for improving DEI outcomes in our industry. The six principles enshrined in the DEI Code are aligned with the values that Verus seeks to uphold in our own organization, in our ongoing efforts to promote greater utilization of emerging and diverse managers in our clients’ portfolios, and in our pioneering work as a founding member of the Institutional Investing Diversity Cooperative (IIDC) which seeks to obtain better and more transparent data from investment managers about their diversity practices,” he noted.

“Verus values the importance of building a diverse workforce and leadership team that are representative of the communities we serve,” stated Shelly Heier, president, Verus and a founder of the IIDC. “We strongly believe that the imperatives for pursuing better DEI outcomes are both practical and moral. Diverse viewpoints and methods of problem-solving lead to more robust investment decision making while, at the same time, diversity within our industry is a social good that benefits the community at large and provides opportunities for disadvantaged segments of our society.”

The CFA Institute notes that the objectives of the DEI Code are to:

- Meet the industry where it is currently;
- Define key principles for firms to implement in order to drive improvement from a realistic foundation; and
- Provide a metrics-based reporting framework that can produce meaningful results.

### About Verus

Verus Advisory, Inc. (Verus) is an independent, employee-owned provider of non-discretionary consulting and discretionary management (OCIO) services since 1986.

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