

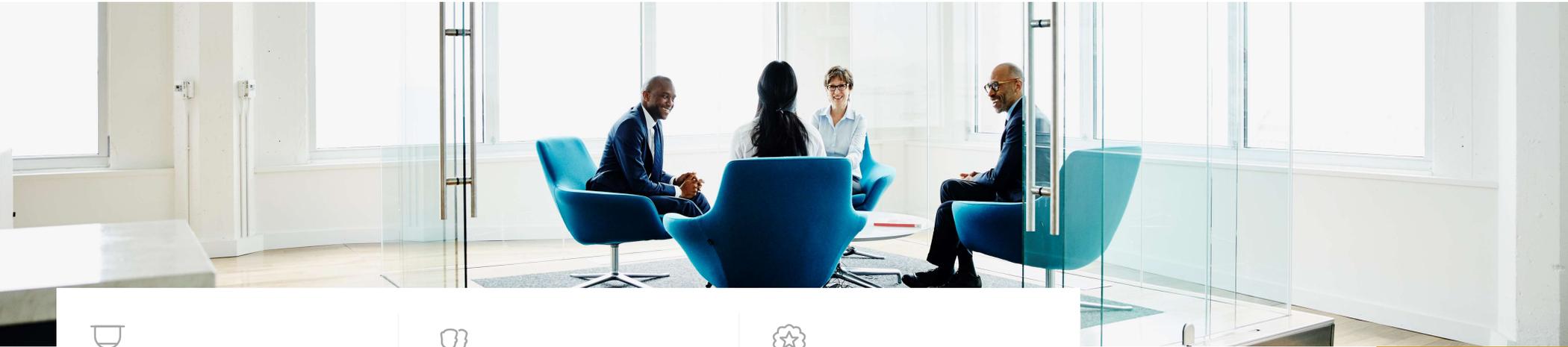


Honoring the Past & Building the Future

Celebrating 118 Years of Legacy and Leadership



Discussion Topics



Our History



Building the Future



How We All Win





Our History

A Historic Past Highlighted by Entrepreneurship.



Irreplicable Legacy

One of the most prominent and successful Black-owned businesses of the 20th century. **Today, the lone remaining Black-founded and owned U.S. insurance company.**



Founded in 1905 by Alonzo Herndon, a formerly enslaved man who went on to become Atlanta's first Black millionaire.

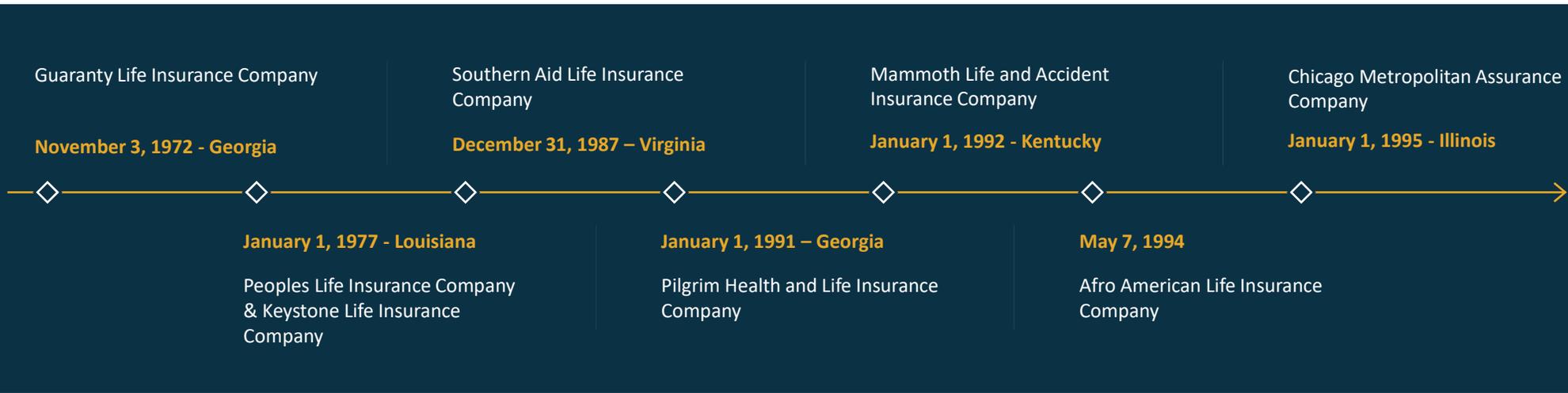


For 118 years, Atlanta Life has protected our most at-risk citizens while advancing social and economic equity for all.

A Pillar of Stakeholder Capitalism



Lineage of Black-Founded Insurance Companies Lives on through Atlanta Life



Teche Insurance – bought by Imperial Life Insurance Company of Louisiana – bought by Peoples Life Insurance Company.



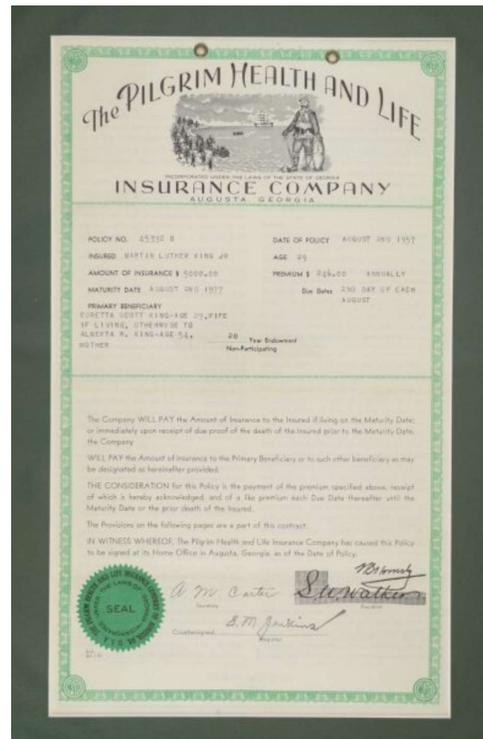
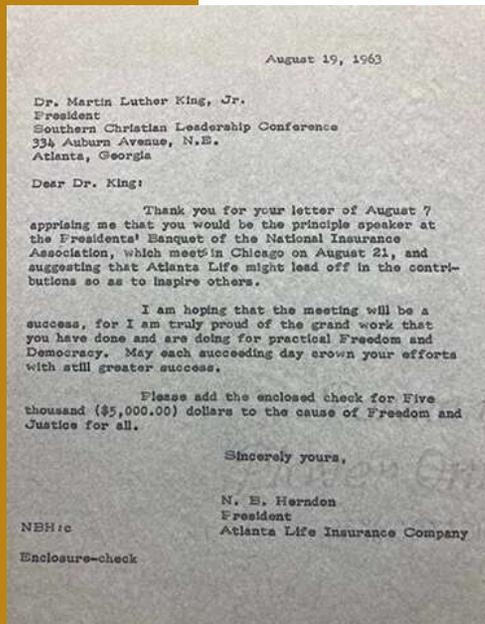
Jackson Mutual Life Insurance Company – acquired by Mammoth Life Insurance Company



Superior Life Insurance Society - Detroit – bought by Mammoth Life Insurance Company.

Atlanta Life

Atlanta Life Insurance Company is the proud holder of Dr. King's life insurance policy



- ALIC played a significant role in supporting the Civil Rights Movement and Dr. King's efforts.
- Life Insurance helped secure financial protection for Dr. King's family in case of any tragic events, considering the challenges and dangers he faced during his activism.
- ALIC contributed to economic empowerment within the African American community, fostering resilience and strength during the Civil Rights era.
- The legacy of Alonzo Herndon and Dr. Martin Luther King Jr. will forever live on and we at Atlanta Life are dedicated to the betterment and advancement of those in the Black community.

*ALIC acquired The Pilgrim Health and Life Insurance Company in 1991



Building the Future

Continuing the Legacy in the 21st Century.



2 0 2 4



A New Dawn. A New Day.

On January 20, 2023, Atlanta Life Insurance Company was acquired by a group of nationally recognized African-American entrepreneurs and executives, through Atlanta Life Holdings. The new ownership group is committed to continuing Mr. Herndon's mission and building on Atlanta Life's century of service.

Atlanta Life remains a symbol of resilience and empowerment and continues to be committed to its mission of providing financial security and opportunities to its policyholders and the broader community.



“
It's not whether you
can become successful ...
it's how many people can you
help become successful.
”





Empowering Our Communities

Atlanta Community Impact

In honor of the Herndon Legacy, we created the "Legacy Lab." "Legacy Lab" includes interactive workshops designed for youth to learn financial literacy, leadership, teamwork and entrepreneurship

Our Legacy Lab event included:

- 124 Guests attended the event (Atlanta Children & Guardians)
- 300+ giveaways depleted (branded bags, water bottles, identity t-shirts)
- 100+ Free Haircut stipends gifted
- Secured over 30+ media placements resulting in 181 MM impressions
- A monetary donation was made to Us or Else Corp, continuing to pour into the Atlanta Community



WE ARE THE COMMUNITIES WE SERVE



Empowering Our Communities

Chicago Community Impact

As we continue partnership and community efforts, we are intentional about further education in all avenues. We had the privilege and honor to host a private book signing event for Carla Harris. Her work and dedication to sharing “pearls” of wisdom aligns with our vision of “Building the Future”.

- The event was standing room only and in true Atlanta Life legacy over a 100 books were provided to those in attendance to support Carla Harris and those that attended.
- Atlanta Life also invited attendance from the Chicago based nonprofit group the Academy. For these young working adults Atlanta Life supplied new engraved portfolios and pens to help further support of their career and leadership development.



An event flyer for the 'Lead to Win' book signing. At the top are the logos for Atlanta Life Insurance Company and EquiTrust Life Insurance Company. The title 'LEAD TO WIN' is in large, bold, gold letters, with 'Book Signing' in a cursive font below it. Underneath, it says 'Discussion and Q&A'. The author's name, 'CARLA A. HARRIS', is prominently displayed, followed by her credentials: 'Author, Wall St. Vet Motivational Speaker'. The event date is 'November 27, 2023' and the time is '5 PM - 7 PM'. The location is 'Taste 222, 222 N Canal St, Chicago, IL 60606'. It notes that 'Hors D'oeuvres & Beverages will be served'. A QR code is provided for RSVP, with the text 'RSVP by Monday, November 13, 2023' and 'Scan the QR Code or Visit bit.ly/twrsupchi'. A small testimonial from Adam Grant is included: 'Carla Harris knows a thing or two about success, grit, courage, and how to win today. Her powerful, practical book is filled with pearls of wisdom that are for everyone.' The book cover 'Lead to Win' is shown with the subtitle 'How to Be a Powerful, Impactful, Influential Leader in Any Environment'. The author's name 'Carla A. Harris' and the website 'carlaspearls.com' are at the bottom.



Your Partner in Financial Wellness



27%
of Americans reported “just getting by” or “finding it difficult to get by” financially

57%
of American employees say finances are the top cause of stress in their lives

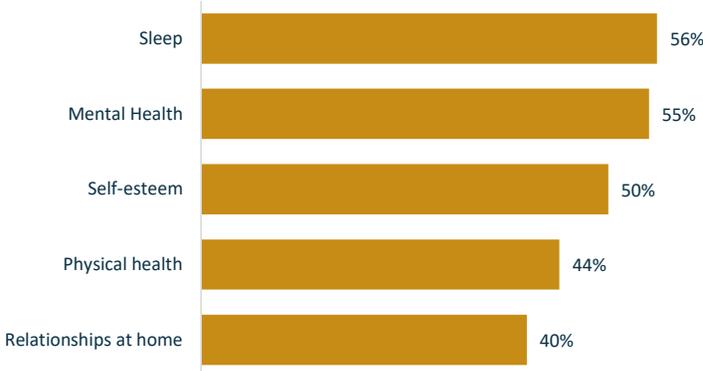
49%
of employees find it difficult to meet household expenses each month

74%
of employees seek financial guidance when dealing with financial decisions, crises, or life events

Financial Wellness is More Important Today than in Previous Years

- Financial wellness is not exclusive to money and includes savings, spending habits, debt, and retirement preparation which can all be contributors to financial stress
- As the U.S. has been experiencing an inflationary environment since 2022, financial insecurity and stress have been on the rise signaling a growing need for financial wellness
 - 53% of employees say that they are most worried about their expenses increasing/everything costing more, and 59% of employees report that compensation isn't keeping pace with increasing cost of living expenses – up from 52% in 2022
- As all dimensions of wellness are co-dependent, financial stress can affect physical, mental, social, and emotional wellbeing and manifest as sleep loss, anxiety, headaches/migraines, immune health, high blood pressure, muscle tension, heart conditions, and depression
- Despite the growing belief that financial wellness benefits are important for employees, most employers do not offer financial wellness platforms or programs as part of their benefits package
 - According to the 2023 Transamerica Institute report, only 28% of employers offer financial wellness programs

Impact of Financial Stress On...



Increase Financial Wellbeing By...

Improving Financial Literacy	Investing & Protecting Against Loss (i.e. insurance)
Budgeting	Boosting Earning Power
Increasing Retirement Contributions	Creating an Emergency Fund
Automating Savings	Using Financial Professionals or Platforms

Source(s): PwC's 2023 Employee Financial Wellness Survey, Transamerica Institute's 2023 Stepping Into the Future report, Substance Abuse and Mental Health Services Administration

Valuing our Customers

Customer Impact: Financial Literacy with UPS

Atlanta Life is dedicated to serving its customers and their employees. In observance of April's designation as Financial Literacy Month, Atlanta Life partnered with the dfree® Movement to host a financial literacy event for ALIC's customer, UPS. Dr. Soaries, CEO and Founder of dfree®, provided expert financial advice to UPS employees.

The Event At-a-Glance

- 100+ UPS employees attended at the UPS corporate headquarters in Atlanta
- Opening remarks and introductions were made by Atlanta Life's very own, Trish Payne
- Dr. Soaries relayed valuable and tangible advice to the employees, emphasizing what he deems "seven minutes of intentionality" dedicated to assessing finances each day
- Atlanta Life worked closely with UPS's global supplier diversity team to plan the event and ensure that all UPS employees were invited to attend

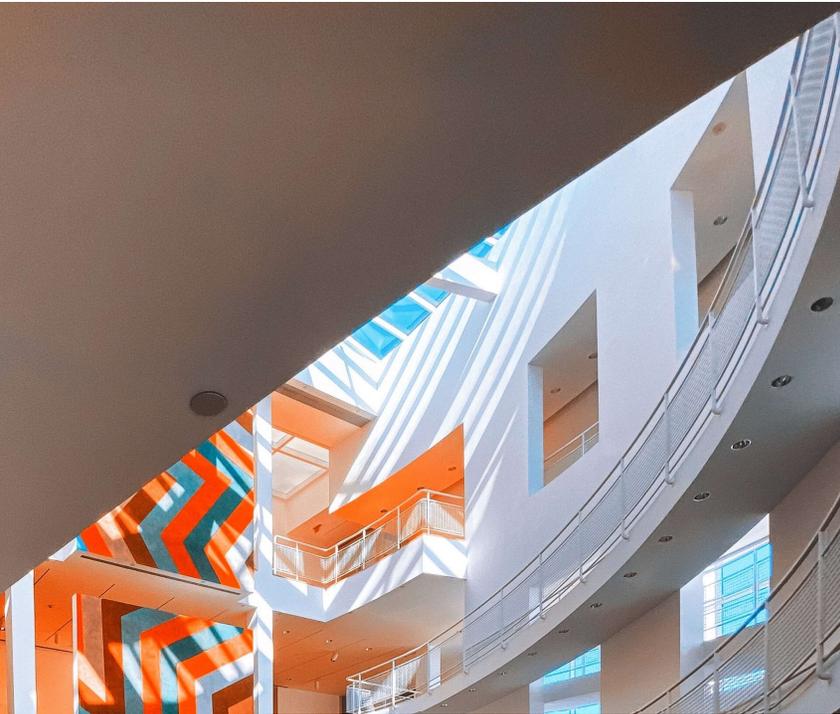




How We All Win

A Dedication to Diversity, Equity, & Inclusion via
Supplier Diversity





Supplier Diversity Benefits

Unlock more value in your Supplier Diversity program by partnering directly with a minority-owned insurance company

Incorporate Diversity & Inclusion into your Employee Benefits value chain

Achieve Directed Tier 1 or Tier 2 Supplier Diversity spend through your existing Employee Benefits spend

Meet or exceed community impact metrics by partnering with Atlanta Life and the Herndon Foundation





Utilize Group Benefits & Reinsurance to Achieve Supplier Diversity Goals





We are a valuable Strategic Partner to corporate and civic leaders



We have rapidly growing reach to the leaders of socially responsible, diversity and equality focused organizations seeking to partner with an American business and civil rights icon

Employers



Direct Writing Partners



Reinsurance Partners





Thank You



Contact

BusinessDevelopment@AtlantaLife.com

In choosing Atlanta Life as your strategic partner, you're selecting more than an insurer – you're choosing a collaborative ally committed to elevating both our organizations to new heights. Let's embark on a journey of shared success, where our values converge to create a formidable force in the insurance industry.

The future is brighter when we shape it together.