



WSIA
**TALENT ADVOCACY
& ENGAGEMENT**
FOUNDATION

2025 ANNUAL REPORT



2025 EXPLORATION TRACK INTERNS

"I am incredibly grateful for an amazing summer. I never anticipated I would learn so much or that the program would be so well-planned. This experience has allowed me to build a strong community not only within my host company but also with the other 41 incredibly talented interns in the program, many of whom I now consider good friends. I'm sure our paths will cross again in our future careers, and I'm thankful for the connections I've made. This internship has truly been a significant and positive step in my professional journey."

"The program was wonderful. Every aspect was highly thought out, and it took a lot of the stress away from the idea of an internship far from home."



"I had such an incredible time during the summer. I feel so grateful to be able to experience this and meet all the people that make up the community. I am forever impacted and touched by every single person I've had the opportunity to connect with in the industry. I truly feel everyone's passion and care for the next generation of insurance professionals."

MESSAGE FROM THE CHAIR



Dear WSIA Members and Stakeholders,

Over the past year, the Talent Advocacy & Engagement Foundation has continued to make meaningful progress in strengthening and expanding the talent pipeline that supports our industry. I remain very proud of the Foundation's work and optimistic about its long-term impact on the whole-sale, specialty, and surplus lines marketplace.

The Foundation's efforts are guided by three strategic pillars: student and talent outreach, workplace culture resources for members, and board and association governance initiatives. This focused approach allows us to advance practical, measurable initiatives while providing member firms with tools and insights to attract, develop, and retain high-performing professionals.

I firmly believe that building a broad talent pipeline that welcomes individuals with varied experiences, skills, and perspectives makes our industry stronger and more resilient. When firms invest in reaching new audiences and developing future leaders, they enhance collaboration, deepen employee engagement, and position themselves for sustained success. Through the Foundation's programs and partnerships, this commitment translates into real momentum across our membership.

It is my privilege to present the 2025 Annual Report, which highlights the progress and accomplishments of the past year. Thank you for your continued partnership and support in advancing the Foundation's mission and strengthening the future of our industry.

Carlton Maner

Chair, WSIA Talent Advocacy & Engagement Foundation Board



WSIA TALENT ADVOCACY & ENGAGEMENT FOUNDATION

WSIA TALENT ADVOCACY AND ENGAGEMENT FOUNDATION MISSION STATEMENT

The WSIA Talent Advocacy & Engagement Foundation was founded in 2020 to stimulate and attract a broad pipeline of talent for the wholesale, specialty and surplus lines insurance industry and to promote an Association and workplace cultures where all people have what they need to be successful in the industry.

The Foundation strives to:

- provide education resources and programs designed to cultivate a culture for WSIA and its membership where all people feel supported and have what they need to succeed in the industry;
- remove any barriers to enable all people to compete on a level playing field; and
- foster synergy with similar initiatives among all industry participants.



TALENT OUTREACH INITIATIVES

- Presentations to 1,785 students through informational sessions promoting insurance career opportunities.
 - o Talent Outreach and Internship Committee members presented at Fisk University, the Alpha Phi Alpha Regional Conference, the University of Southern California, Howard University and The University of Texas at San Antonio. They also participated in career fairs at the Thurgood Marshall College Fund Development Summit for Historically Black Community Colleges, the USC Black Career Fair, Annual AMEND Summit in Los Angeles, the Black Student Athlete Summit in Chicago, the USC Student Athlete Career Fair and the Business Insurance Career Fair.
 - o New partnerships with the Thurgood Marshall College Fund and HBCU IMPACT contributed in part to a:
 - + 149% increase in the number of students reached.
 - + 75% increase in internship applications received for the Exploration track.
 - o Students from Clark Atlanta University, the College of St. Scholastica, Fisk University and Lemoyne-Owen College attended WSIA symposiums in Atlanta and Chicago through grants provided by the Foundation.
- Hosted Talent Advocacy & Engagement Foundation Interns to work with a WSIA member firm for nine weeks.
 - o Interns come to the program without RMI experience.
 - o Top seven interns attended Annual Marketplace; top two interns were selected to participate in the 2026 WSIA Internship Program and receive an additional \$2,500 scholarship, and shadow industry leaders.
 - o Two Talent Advocacy & Engagement Foundation interns, who earned a WSIA Internship in 2024, were also chosen as J.H. Blades Scholars.
 - o Six former interns from 2023 and 2024 were selected for the 2025 WSIA Internship Program.
- Supported Gamma Iota Sigma (GIS) as a Sustaining Partner in its work to cultivate a broad talent pipeline for the industry. The GIS Foundation's mission is to ensure equitable access to careers in insurance, risk management, and actuarial science by lowering the social and financial barriers for all



students, regardless of background or means. WSIA staff serve in volunteer capacities for GIS.

- Launched new partnership with the national INVEST program to produce a first-time E&S module included in their online curriculum. This collaborative effort among Talent Outreach Committee volunteers, former interns, Foundation Board members and staff led to this new module intended to expand high school students' understanding of E&S in the insurance marketplace and the variety of professional pathways available.

MEMBER-FOCUSED TALENT ENGAGEMENT INITIATIVES

- Continued partnership with Blue Ocean Brain, a microlearning platform that makes short, interactive videos, games and culture awareness lessons available to members.
 - o 6,678 lessons were viewed on Blue Ocean Brain and 50% of learners fully completed lessons in the platform.
- Sent six bi-monthly culture resources e-Newsletters to all WSIA members with a 35% open rate.
- Increased LinkedIn followers to 1,030, a 22% increase over the prior year.
- Offered seven webinars to members including *Emotional Intelligence*, *Neurodiversity: What It Is and What It Isn't*, *Cultivating Inclusive Spaces*, *Disability Inclusion: Your Role in Disability Inclusion No Matter Your Title*, *Developing and Maintaining Workplace Relationship Through a Lens of Inclusion*, *Nonprofit Board Essentials*, and *Reducing the Stigma of Mental Health in the Workplace*. Participation increased by 24% to 870 over 2024.
 - o Recordings remain on the WSIA website to view on demand.
- Launched the new Professional Empowerment Series delivered to 25 individuals representing eight member firms. Topics include Managing Your Network, Being Your Authentic Self, Managing Your Brand, and Finding and Leveraging a Mentor. Each session was facilitated by an industry executive.

- Provided inclusive workplace consulting to talent practitioners at several WSIA member firms as needed on strategic talent issues.
- Incorporated feedback from practitioners into intern information sessions to enhance their readiness for E&S career opportunities.
- Integrated inclusive leadership principles into U40 Connect and embedded content into Excess & Surplus Lines Program, Leading People & Teams, and Executive Leadership Summit.
- Sponsored the AKO Consulting - Black Women in the Insurance Industry Conference, and the Greater Kansas City NAAIA chapter's membership event.
- Expanded facilitation of complex/difficult inclusion conversation across the membership through a collaboration with CIAB (Counsel of Insurance Agents & Brokers).
- WSIA and the Foundation were named as the 2025 Leader in Disability Inclusion by the Center for Disability Inclusion honoring our commitment to accessible meetings, events, education programs, and educating WSIA members on accessible workplace culture.

BOARD AND ASSOCIATION GOVERNANCE INITIATIVES

- The Nominating Committee recommended nominees for three positions.
- The Foundation and WSIA Boards collaborated to review the impact of the President's Executive Orders on the Foundation's mission and took appropriate steps to ensure the mission moves forward.
- WSIA committee members received reminders of everyday acts of inclusion to practice in their meetings and the workplace in general.

BOARD OF DIRECTORS



Carlton Maner, Chair
Atlanta, GA



Tony Chimera, Vice Chair
Westfield Specialty
Alpharetta, GA



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Burns & Wilcox
Chicago, IL



Carey Bond
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Nationwide E&S/Specialty
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Thurston (TJ) Davis Jr.
RT Specialty
Birmingham, AL



Gerald Dupre
Atlanta, GA



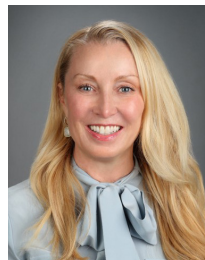
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Duffy Koller
Paragon Excess & Surplus
Lines
Chicago, IL



Liz Kramer
Munich Re Specialty
Princeton, NJ



Marya Propis
RT Specialty
New York, NY



Jacque Schaendorf
Insurance House
Atlanta, GA



Molly Shah
Amwins
Charlotte, NC

2025 TALENT ADVOCACY & ENGAGEMENT FOUNDATION ROADMAP MILESTONES

Student and Talent Outreach

- Establish strategic talent pipeline relationships in higher education
- Establish partnerships to introduce youth and the military community to E&S as a career option
- Accelerate interns' readiness for E&S roles

Member-Focused Inclusive Culture

- Promote career development resources for early-career talent
- Provide resources to promote accessibility in the workplace
- Expand facilitation of complex culture conversations

Association-Focused

- Gain member firms' commitment to the Foundations' work
- Operationalize the Foundation's mission in the Association's policies and practices
- Engage industry partners aligned with the Foundation's mission



FOUNDATION BALANCE SHEET

	<u>Dec. 31, 2025</u>	<u>Dec. 31, 2024</u>
Assets		
Cash	\$ 826,154	\$ 215,419
Funds Held by Others	521,053	497,176
Receivables	635,000	1,480,000
Prepaid Expenses	57,279	311,567
Total Assets	<u>\$ 2,039,486</u>	<u>\$ 2,504,162</u>
Liabilities and Net Assets		
Accounts Payable	\$ 12,437	\$ 23,576
Total Liabilities	<u>12,437</u>	<u>23,576</u>
Net Assets		
Unrestricted	<u>2,027,049</u>	<u>2,480,586</u>
Total Liabilities & Net Assets	<u>\$ 2,039,486</u>	<u>\$ 2,504,162</u>

FOUNDATION INCOME STATEMENT

	For the Years Ending	
	<u>Dec. 31, 2025</u>	<u>Dec. 31, 2024</u>
Revenues		
Contributions	\$ 418,363	\$ 792,293
Interest Income	23,877	22,176
Total Revenues	<u>442,240</u>	<u>814,469</u>
Expenses		
Talent Outreach Initiatives	359,444	364,649
Member-Focused Inclusive Culture Initiatives	276,587	139,955
General and Administrative	259,746	240,317
Total Expenses	<u>895,777</u>	<u>744,921</u>
Change in Net Assets	(453,537)	69,548
Net Assets, Beginning of Year	<u>2,480,586</u>	<u>2,411,038</u>
Net Assets, End of Year	<u>\$ 2,027,049</u>	<u>\$ 2,480,586</u>



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