

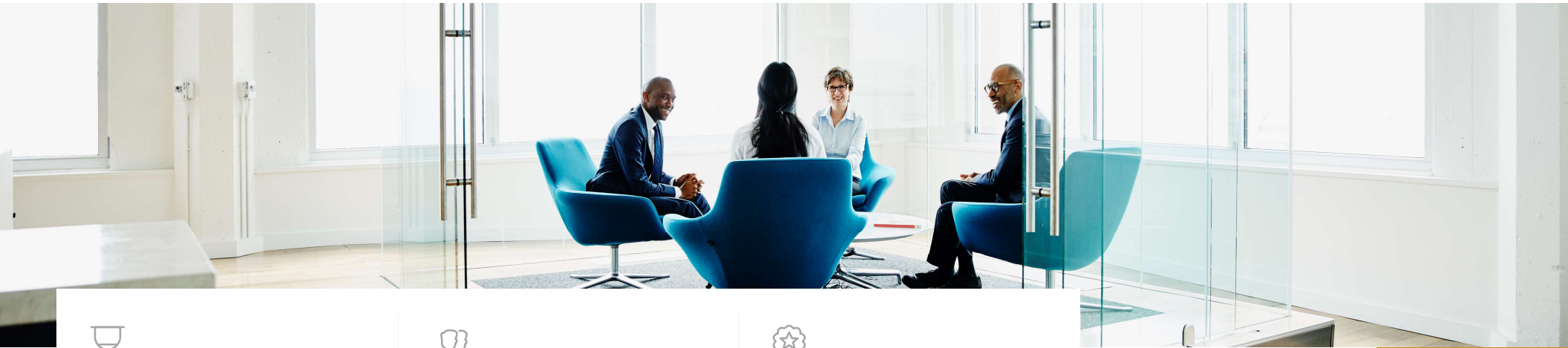


# Honoring the Past & Building the Future

*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 20<sup>th</sup> century. **Today, the lone remaining Black-founded and owned U.S. insurance company.**



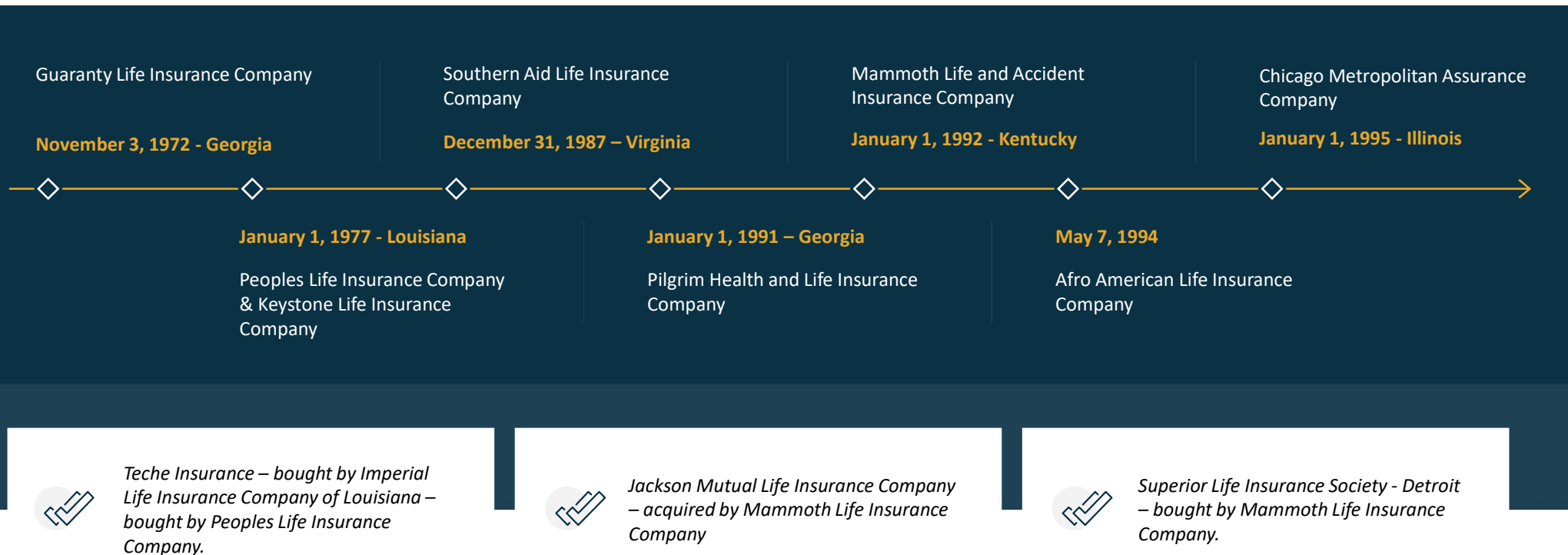
Founded in 1905 by Alonzo Herndon, a formerly enslaved man who went on to become Atlanta's first Black millionaire.



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



## Atlanta Life

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



August 19, 1963

Dr. Martin Luther King, Jr.  
President  
Southern Christian Leadership Conference  
334 Auburn Avenue, N.E.  
Atlanta, Georgia

Dear Dr. King:

Thank you for your letter of August 7 apprising me that you would be the principle speaker at the Presidents' Banquet of the National Insurance Association, which meets in Chicago on August 21, and suggesting that Atlanta Life might lead off in the contributions so as to inspire others.

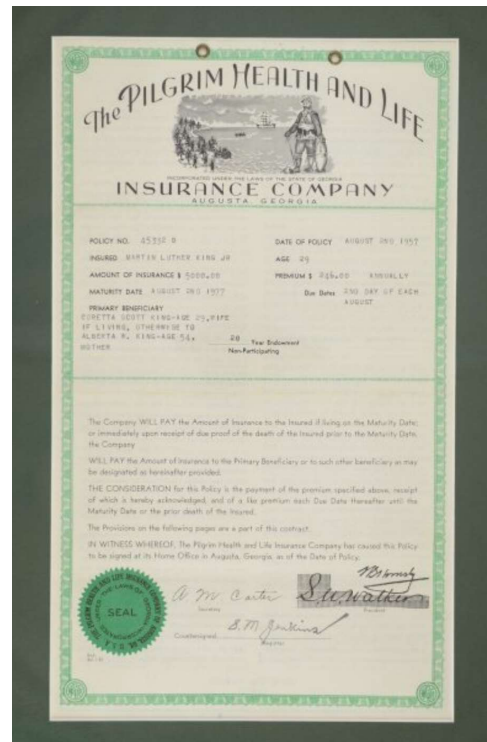
I am hoping that the meeting will be a success, for I am truly proud of the grand work that you have done and are doing for practical Freedom and Democracy. May each succeeding day crown your efforts with still greater success.

Please add the enclosed check for Five thousand (\$5,000.00) dollars to the cause of Freedom and Justice for all.

Sincerely yours,

N. E. Herndon  
President  
Atlanta Life Insurance Company

NBH:c  
Enclosure-check



- 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.

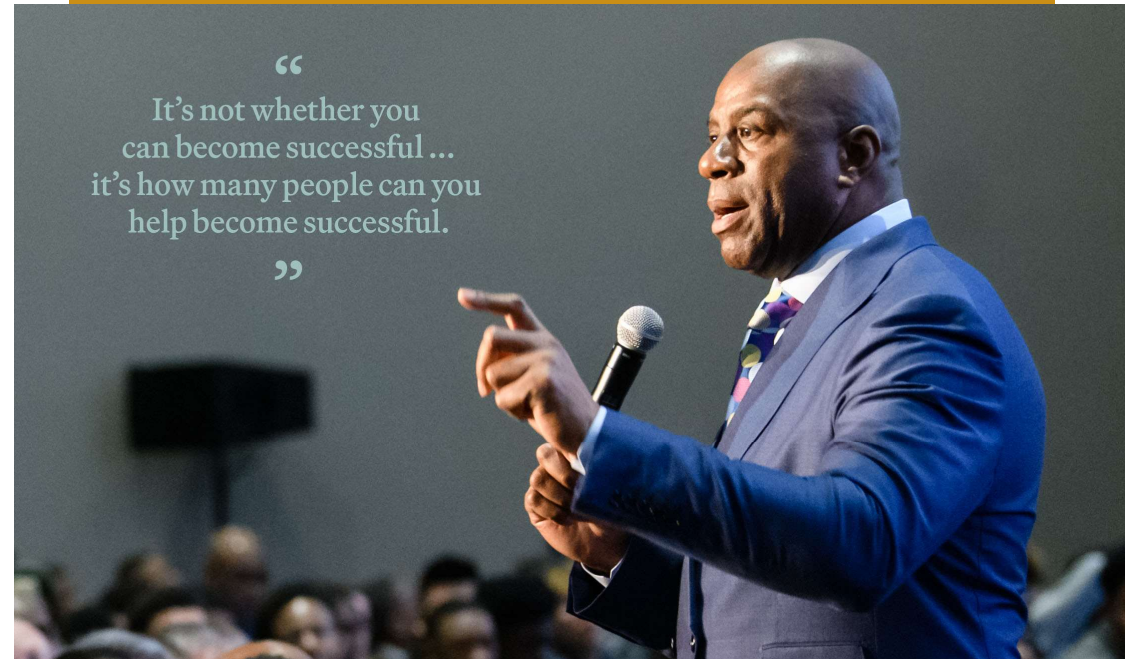




## A New Dawn. A New Day.

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.



# LEAD TO WIN

*Book Signing*

Discussion and Q&A

**CARLA A. HARRIS**  
Author, Wall St. Vet  
Motivational Speaker

November 27, 2023  
5 PM - 7 PM  
Taste 222  
222 N Canal St,  
Chicago, IL 60606

Hors D'oeuvres & Beverages  
will be served

Books will be provided to attendees  
on a "first come, first served" basis  
while supplies last

RSVP by Monday,  
November 23, 2023  
Scan the QR Code or Visit  
[bit.ly/twzsqpchi](https://bit.ly/twzsqpchi)

How to Be a Powerful,  
Impactful,  
Influential  
Leader in Any  
Environment

**Carla A. Harris**  
*Lead to Win: A Strategy to Win*

[carlaspearls.com](https://carlaspearls.com)



# 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

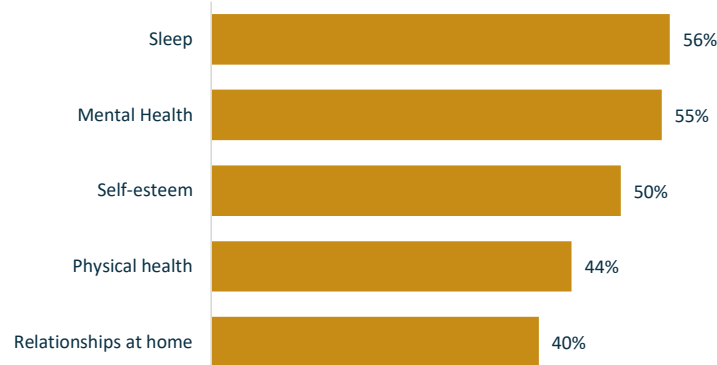
74%

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

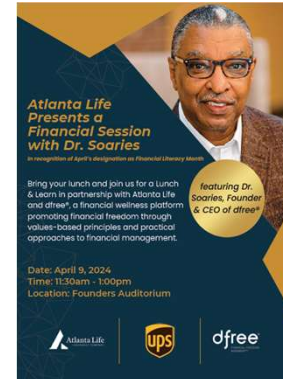
# Valuing our Customers

## 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

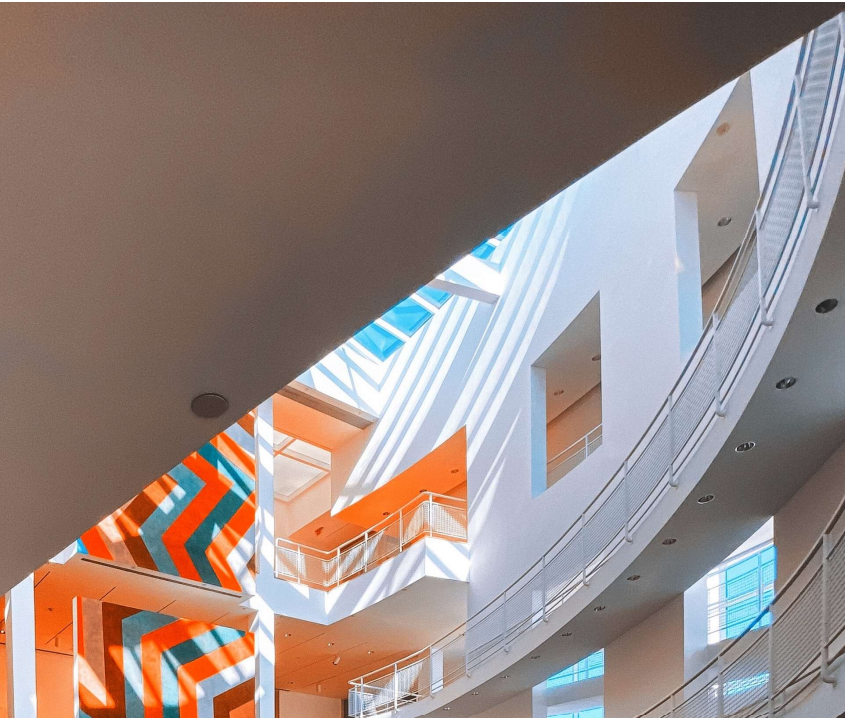




# How We All Win

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





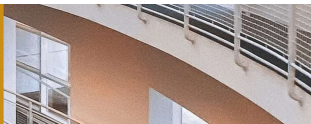
## Supplier Diversity Benefits

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

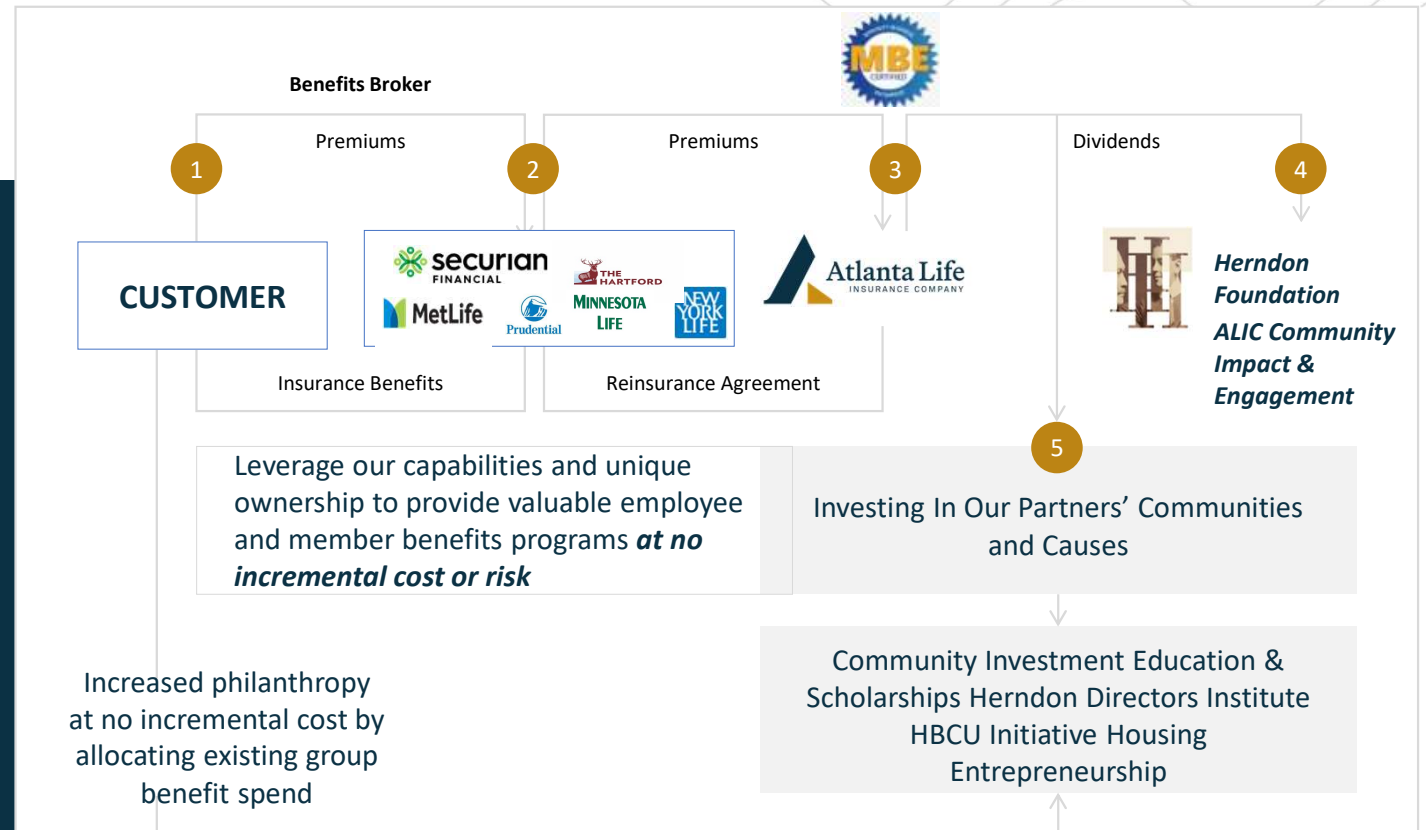
**Achieve Directed Tier 1 or Tier 2 Supplier Diversity** spend through your existing Employee Benefits spend

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](mailto: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.*