

Inaugural Annual Report 2018



Members of the Boca Raton HJ Sims team at the Florida Steps for Life!

What is the HJ Sims CSR program?

HJ Sims is pleased to introduce our CSR program, an initiative through which we actively serve our local communities by

contributing to and volunteering with charitable organizations. We place value on helping to make our world a better place. We contribute to our communities via our Corporate Social Responsibility (CSR) program, which focuses staff volunteer efforts and contributions to non-profit, charitable organizations.

Our Mission

HJ Sims' CSR program provides inspiration to our staff, clients and to those we serve. We will affect change and make a difference in our local communities. We will accomplish this by bringing awareness to and increasing support for economic, social and environmental well-being through coordinated corporate and regional efforts, including the donation of funds and/or volunteering staff time. We will engage and inspire our staff by providing access, time and opportunities for giving back in a meaningful way.

For inquiries, *please contact Tara Perkins at tperkins@hjsims.com or 203-418-9049*

Our 2018 CSR Efforts

Gift of Life

We are thrilled to announce that HJ Sims has selected Gift of Life (GOL) as our partner charity for our Corporate Social Responsibility (CSR) program.



A little about GOL's mission: GOL believes that every person battling blood cancer deserves a second chance at life – and they are singularly passionate about engaging the public to help involve everyone in curing

blood cancer – whether as a donor, a volunteer or a financial supporter. All it takes is one person to perform a painless, life-saving swab to discover a potential match for someone suffering from blood cancer – and a cure. For more on GOL's history and mission, please visit: www.giftoflife.org





HJ Sims Launches Corporate Social Responsibility Program with First-ever Virtual Swab Event for Gift of Life Marrow Registry

In July, HJ Sims supported Gift of Life (GOL), with our company-wide event, Virtual Swab 2018.

Total contribution:

Gift of Life received 57 swab kits – that's 57 potential matches to save a life!



During HJ Sims' Virtual Swab for GOL, more than 40 employees swabbed to join the marrow registry. The entire company connected via video technology, along with the GOL team, to learn more about the donor process and to hear GOL CEO and founder, Jay Feinberg's story. After being diagnosed with leukemia almost 30 years ago, Feinberg and his parents launched a years-long drive to find a



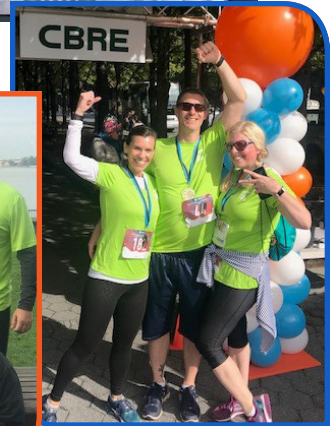
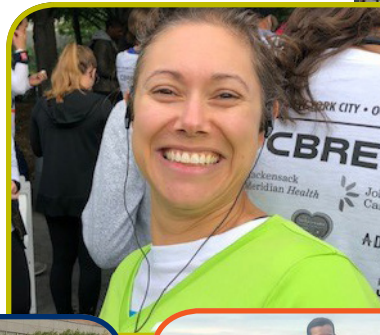
marrow match; the very last and 60,000th donor was the person that saved his life. The miracle inspired him to start GOL in order to save as many people as possible who face a blood cancer diagnosis.



Members of the Fairfield and Boca Raton HJ Sims team swab to save lives!

Steps for Life 5k Events

The HJ Sims team participated in the Gift of Life (GOL), Marrow Registry's Steps for Life 5k at Battery Park in **Manhattan, Boca Raton, FL and Boston.** The courses were beautiful, the events joyful, and the cause extremely worthwhile.



Members of the Fairfield and New Jersey HJ Sims team at the NY Steps for Life.

Total contributions:

435 people participated in the **New York** race,
510 at the **Florida** run, and **345** at the **Boston** event!



Members of the Fairfield and New Jersey HJ Sims team at the Boston Steps for Life.



44 HJ Sims' team members
participated over the **three 5k runs!**

The Personal Efforts of our Employees

In Boca Raton, **Cliff Edelmann**, Vice President/Investments, and **Ed Muster**, Senior Vice President/Income Advisor, participated in the Gift of Life (GOL), donor program's annual Steps for Life walk/run at Sunset Cove in South Regional County Park in January, an event that engages the public's help in curing blood cancer and raises awareness for bone marrow and blood stem cell transplants. At the event, a Miami woman who was diagnosed with a rare form of lymphoma, had the opportunity to meet the marrow donor who saved her life. Cliff's cousin, Randi, was a recipient of a bone marrow transplant during her battle with Leukemia. That transplant, made possible through the GOL Registry, enabled her to attend the wedding of her oldest child and see the birth of several children in her family. While she ultimately lost her battle with cancer, the transplant lengthened her life by a decade. Ed Muster's son-in-law is a hero, having saved someone's life as a bone marrow donor. Cliff and Ed join the legions of other concerned citizens who help raise awareness about this crucial life-saving registry. What started with one person and his search to find a match has grown into an organization of 280,000+ volunteer donors, and 3,181 lives saved to date.

A few years ago, a young son of a close friend of Senior Vice President/Financial Advisor, **Bill Ford**, was lost to brain cancer. In Minnesota, Bill helped start an Endowment Fund known as Ben's Helping Hand, on behalf of Ben Stein, to raise funds for treatment for those families who have a child fighting cancer.

To date, Bill's team has raised approximately \$100,000 and has helped 26 families in the Fargo, ND/Moorhead, MN area.



Members of the Boca Raton team at the FL Steps for Life.

Julianne Smith, Vice President/Business Development in our Fairfield, CT office, has been volunteering for more than 10 years as a coach, parent and donor at the Wakeman Boys & Girls Club of Bridgeport and Southport. Julie's three daughters have been part of Wakeman since they were in first grade (they are currently in 9th, 11th and 12th). Julie enjoys giving back to her community and has seen the benefits of giving kids a safe and positive place to build confidence and self-worth. Wakeman celebrates children and their unique abilities and talents.

Leann Rua, Vice President Accounting and working from our Fairfield, CT office, participated in the fight against breast cancer by participating in the annual walk organized by the American Breast Cancer Foundation. Leann says, "Most of us know someone who is fighting or unfortunately lost their battle to this terrible disease. This was my ninth walk in memory of my grandmother, cousins and friends."

The Personal Efforts of our Employees *continued*

Peter Opert, Director of Network and Information Systems and based in our Fairfield, CT office, has served on the volunteer board of directors of Connecticut Counseling Centers (CCC) for close to 10 years. CCC is a not-for-profit that provides a full range of outpatient

substance abuse and mental health prevention, education and treatment services to assist adults in becoming productive members of society. CCC is routinely recognized as one of the leading organizations for medication assisted recovery, and has been awarded the Substance Abuse

and Mental Health Services Administration's, Science and Service award for innovations in the field. As a board member, Peter works to educate the public about substance abuse treatment and combat the pervasive, societal stigma attached to methadone maintenance.

Sonia Carrero, Executive Assistant in our Rockville, MD office, volunteers with many organizations via the Gaithersburg Church of Nazarene. She is a Spanish Translator at Gaithersburg HELP, Inc., an organization that provides food and transportation to residents. She also conducts a devotional service for the residents at Sunrise Senior Living and Montgomery Village Health Care Center. At Stewarttown Community, Sonia helps plan the Christmas block party and sponsors a child for school supplies. At the Shady Grove Pregnancy Center, she sponsors an annual "Baby Bottle Campaign" to collect funds for first-time parents facing the costs of an unplanned pregnancy. Sonia prepares and serves dinner on the first Friday of every month for 35 women at the Interfaith Works Women's Center, a transitional shelter for homeless women. Sonia led a mission trip to Puerto Rico July 9-13, 2018, for Hurricane Maria relief efforts. Sonia led another mission trip on April 14-20, 2019 to help with rebuilding efforts.



Sonia led a mission trip to Puerto Rico to help with rebuilding efforts.

The 16th Annual HJ Sims Late Winter Conference

Gift of Life (GOL) staff attended the 16th Annual HJ Sims Late Winter Conference in Clearwater Beach at the Sheraton Sand Key Resort. GOL was part of a



Conference attendees gather at the Gift of Life Booth to learn more about how to donate and swab to save a life.

Total contribution:

Gift of Life received 42 swab kits – that's 42 potential matches to save a life.

special presentation at the opening session, which included an introduction to HJ Sims' CSR program by Tara Perkins, AVP Marketing Communications, HJ Sims, and a screening of the GOL/HJ Sims partnership video. Sharon Kitroser, Corporate and Community Relations Officer, GOL, delivered a short history of GOL and introduced a video of Ryan Corning (donor). Ryan then took the stage to discuss his heartwarming experience – there was not a dry eye in the house! GOL staff Marc Silver and Sharon Kitroser, along with Ryan, were on-

hand throughout the event at the GOL Booth in the lobby – swabbing, distributing information and answering questions. It was a wonderful experience to share GOL in this way with this year's Conference attendees.

Kitroser says, "It was truly an honor to join HJ Sims at their late Winter Conference. Gift of Life Marrow Registry presented our mission to save lives through marrow and stem cell donation, and shared how our partnership has come to life in the past 10 months. We introduced one of our heroic donors. Ryan Corning of Land O'Lakes Florida, who saved 47-year-

old New Yorker Julio Rivera, who survived leukemia, thanks to his transplant. Attendees were excited to hear more about how

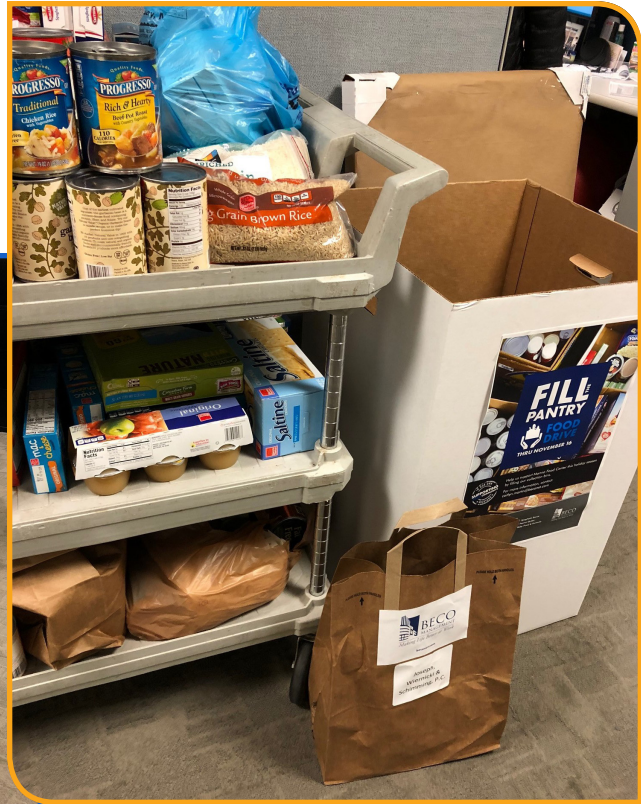
their teams can swab their cheeks to save a life. Plus, more than 30 individuals joined the registry right there at the conference."



Sharon Kitroser, Corporate and Community Relations Officer, Gift of Life, shares information about the organization.

Fall Food Drive

In November 2018, our Rockville, MD office held a food drive. Employees donated non-perishable items to the the Manna Food Center. Ultimately, 336 pounds of food was donated by the community.



“We are excited to partner with HJ Sims and appreciate their commitment to helping those suffering from blood cancer,” **said cancer survivor and Gift of Life CEO/Founder Jay Feinberg.** *“Stem cell and marrow transplants can cure more than 100 conditions including blood cancers, sickle cell disease, and inherited immune disorders. Gift of Life is committed to ensuring that every patient can find a donor in the registry at the time one is needed.”*

“This year, we are pleased to introduce our CSR program. For our inaugural year, we pledge our support for Gift of Life, an outstanding organization with an extraordinary mission,” **said William Sims, CEO and Managing Principal, HJ Sims.**