

A LONG-STANDING CULTURE OF DIVERSITY AND INCLUSION

Jeannine Vanian, Chief Operating Officer, **Kayne Anderson Rudnick Investment Management**, talks about the firm's excellence as recognised in the awards.

Kayne Anderson Rudnick (KAR) is a Los Angeles-based investment and wealth advisory firm founded in 1984. The firm manages assets for corporations, endowments, foundations, public entities, and high-net worth and ultra-high net worth individuals, and offers financial planning, investment advisory, executive and consulting services.

We have long fostered a culture of diversity and inclusion at KAR. That means we work to ensure women and minorities have a strong presence at our firm, including at the executive level, and that our teams reflect the diversity of the world around us. It means having a culture where team members feel comfortable bringing their whole selves to work, are given a voice, valued for their unique perspectives and experiences, and feel a sense of belonging. It also means we seek to understand the needs of those living in the communities we serve.

With our corporate social responsibility (CSR) strategy, our goal is to strengthen the bond between our advisors and surrounding communities by initiating programmes that respond to their most acute needs. We also seek to cultivate stronger relationships with clients by creating outlets to support causes they care about.

Is there a specific community initiative that you are most focused on and why?

One cause we have repeatedly supported is Casa Pacifica Centers for Children & Families, a California crisis care and residential treatment facility providing services to vulnerable children and families. The KAR team has sponsored the holiday gift wish list of roughly 15 to 20 children for the last five years. While children often ask for basic necessities such as toothpaste and soap, we have also been able to provide gifts such as toys, skateboards and board games given our high employee participation.

The organisation has said the gifts, wrapped and delivered to their homes, are the first "real" presents some of the children have received, and have helped restore their faith in humanity while giving them hope of a better future.

Some KAR employees have even brought their children along to buy the gifts, using the programme to teach about charitable giving and community involvement. Our corporate philanthropy has also focused on health care, education, and disaster relief.

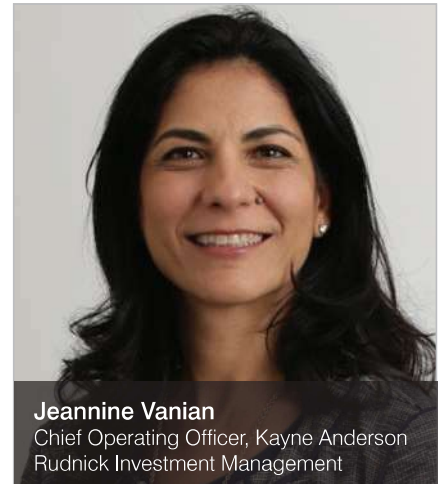
How do you involve clients and employees in your CSR program?

We use the CSR programme as an opportunity to better understand the "hearts and minds" of our clients and communities. For example, in the past clients were asked to vote on the charity recipient of a holiday contribution from KAR.

KAR offers volunteer time off to support activities that enhance and serve our surrounding communities. Through our parent company, Virtus Investment Partners, Inc., we also offer a Matching Gift Program, matching personal contributions to organisations important to our employees.

How do you hope receiving this award will affect your business and the views of prospective clients?

We are known for our investment acumen. But we see this award as a way to showcase our commitment to forging meaningful connections with the people around us, attracting community-oriented advisors and creating an outlet for CSR-minded clients. We have developed a team that exemplifies diversity and embraces the needs of the people who surround us. We want our voices to be heard and we want to help employees take stronger leadership roles - inside and outside the firm. ■



Jeannine Vanian
Chief Operating Officer, Kayne Anderson Rudnick Investment Management

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The *Wealth For Good Awards* are independently judged based solely on the basis of entrant’s submissions and their response to a number of specific questions, which are answered by focusing on the client experience rather than purely quantitative performance metrics. The awards recognize the very best operators in global wealth management with “independence”, “integrity”, and “genuine insight”, the watchwords of the judging process. While the judging process is completely independent of any commercial arrangements between the participants and the organizers, it is expected that winners have an obligation to work with the organizers to promote their award and this obligation is separate to attendance at an awards ceremony. KAR did not pay any fees to participate in the *Wealth For Good Awards*; however, KAR did pay fees for an advertisement and article placement after it was notified that it won. For additional information regarding the *Wealth For Good Awards* and methodology, please visit <https://clearviewpublishing.com/events/the-wealth-for-good-awards-2022/>