BURR: FORMANLLP

2022

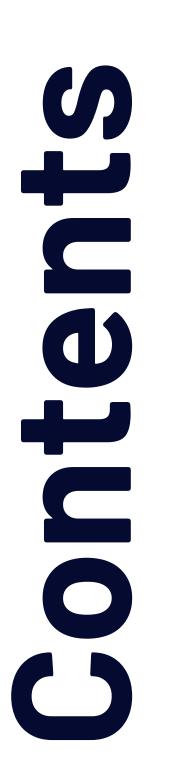
Diversity, Equity, & Inclusion Annual Report

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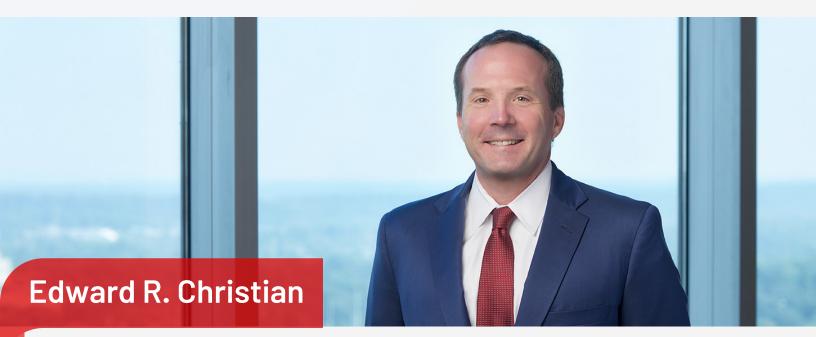
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Reflections from the CEO



Two years ago, the Firm's executive committee made a strategic decision to advance diversity, equity, and inclusion (DEI) as critical components of the Firm's core objectives. We knew that meeting those objectives would require additional investments of time, resources, and expertise. We also knew that we needed full-time executive leadership at the helm, in the form of a Chief Diversity & Inclusion Officer. We did not know how much of an impact these decisions would have. Burr & Forman's culture, vision, and commitment to DEI have evolved beyond our initial expectations in two years.

An Evolving Culture

Throughout the year, the Firm hosts numerous inclusive programs honoring the histories and traditions of diverse groups. These programs offer opportunities for people of various backgrounds to share their heritage and experiences. Listening to their stories is helping to create a culture that openly and respectfully acknowledges different perspectives while cultivating empathy for all.

An Evolving Vision

The Firm's vision has evolved to recognize the dynamic nature of DEI. Advancements require ongoing training and, at times, difficult discussions. This visionary evolution began with firm-wide training series on anti-racism and unconscious bias, each involving multiple segments, expert presentations, and small group discussions. In addition, we hosted Conscious Connect discussion groups, which allowed colleagues to engage each other on controversial issues. We continue to communicate the Firm's values by offering regular trainings and making unconscious bias training mandatory for all new hires. Finally, our vision evolved to include broader societal goals, resulting in the launch of a Social Justice Initiative involving volunteerism, pro bono work, and educational programming.

An Evolving Commitment

Lasting change requires widespread support, and we want to acknowledge the efforts of those involved in and energetically doing the work. We now reward time spent on DEI efforts by crediting up to 50 hours of DEI activities towards annual billable hour requirements.

To fully demonstrate our commitment to DEI and build in a layer of accountability, the Firm is seeking certification under Mansfield Rule 6.0. This rigorous 12-month process will aid the Firm's goal of increasing diversity in leadership and governance roles, lateral openings, equity partner promotions, and formal pitch opportunities.

I am proud to be serving as CEO as this evolution takes place. I am proud of the Firm's leadership and the many supporters among our attorneys and staff who have joined in the effort. I look forward to continuing our unified advancement as we bolster our DEI gains and achievements in 2023.

A Message from the Chief Diversity & Inclusion Officer



When I joined Burr & Forman in January of 2021, it was in the midst of the greatest social upheaval in a generation. National unrest and division were at a critical boiling point. Against this backdrop, I viewed my role as Chief Diversity & Inclusion Officer as a calling to create culture. Who would we be at Burr & Forman, in this historic moment? Would this be a place where diverse perspectives and identities would be welcomed? What would be the Firm's impact on the larger legal and business community? This combined project of internal cultural transformation and external community impact will take time, but we moved closer to the mark in these past two years.

Internally, we expanded perspectives through carefully crafted trainings. In 2022, these included an Inclusive Leadership training for managers of our administrative staff and an Allyship training at the Firm's biannual attorney retreat. We also expanded support of diverse attorneys by adding two more affinity groups. Burr & Forman now recognizes eight groups that are collectively addressing the needs of attorneys who are African American, Asian American, Hispanic/Latinx, LGBTQ+, multiracial, veterans and women. This report will highlight the activities of those groups, including cultural celebrations, professional development workshops, social activities, and a retreat. In addition to our in-house workshops, we increased networking and professional development opportunities for diverse attorneys, with both local and national sponsorships of diverse bar associations and conferences.

Externally, we expanded our investment in the next generation of lawyers. This year marked the official launch of Burr & Forman's Diversity Fellowship, resulting in academic scholarships and mentorships for two first-year law students. The Firm also hosted perhaps its most robust and engaging Pre-Law Program to date, offering a month-long internship to diverse college students and recent graduates. Finally, our attorneys committed to greater engagement with diverse student groups at law schools by hosting campus workshops on exam prep, interviewing skills, and networking. These activities will lay the groundwork for a more diverse profession in coming years. We are already beginning to see the impact of these efforts. In 2022, 61% of our associates were from backgrounds historically underrepresented in the legal profession, including women, racial minorities, and persons with disabilities.

We are proud of the progress made in the past two years and the growing recognition of our efforts. In 2022, the Wells Fargo Legal Department announced that it had selected Burr & Forman for its 2021 Outside Counsel Diversity Award. This annual honor recognizes an outside law firm that demonstrates great efforts toward improving the engagement of diverse personnel at all participation levels and creating a culture of equity and inclusion in their workplace and community. For progress in gender equity, the Diversity & Flexibility Alliance honored Burr & Forman with its 2021 Tipping the Scales award. This award acknowledges firms for having 50% or more women in their new partner classes. Most recently, Burr & Forman was named a 2022 BTI Associate Satisfaction A-Lister for being a leader in activities that associates value most for deriving high levels of job satisfaction. These accolades are indeed an honor, but this is no time to rest on our laurels. This is just the beginning, and we look forward to the continued transformation that will take place.

Cultural Programs

In 2022, we fostered inclusion by honoring the culture and contributions of historically marginalized people. Below are highlights of our educational programs.

BLACK HISTORY MONTH

Burr & Forman hosted "On the Forefront of Integration: A Conversation with Ralph Stokes" during Black History Month. Mr. Stokes, Vice President of Diversity, Equity, and Inclusion at the PGA Tour Superstore and author of "One of the First: Lessons I Learned While Overcoming the Challenges of Integration," described his journey of living through integration to climbing the ranks of corporate America. From aspiring to play on the Booker T. Washington football team in Montgomery, Alabama, to playing for the University of Alabama's football team under the legendary Coach Paul "Bear" Bryant, Ralph gave accounts of experiencing involuntary integration, discrimination, Black achievement, and positive interracial relationships in the Deep South through a profound and unique lens.



WOMEN'S HISTORY MONTH

During Women's History Month, Burr & Forman invited sociologist Marianne Cooper, Ph.D., to share her data-driven, scientific expertise on gender inequality, women in leadership, and trends regarding women in the workplace. Dr. Cooper is a senior research scholar at Stanford University's VMware Women's Leadership Innovation Lab and an ongoing contributor to McKinsey's annual report, *Women in the Workplace*. In an eye-opening interview, Dr. Cooper discussed studies on the causality and pervasiveness of bias and the misconception of objective performance evaluations.

ASIAN AMERICAN/PACIFIC ISLANDER HERITAGE MONTH

For Asian American/Pacific Islander Heritage Month, Burr & Forman attorneys and staff completed virtual games and engaged in small group discussions. The interactive puzzles and activities highlighted waves of immigration to the U.S., economic contributions, and geographic concentrations of different AAPI groups in America. Discussions focused on unique challenges of inclusion for Asian Americans, including the perpetual foreigner stereotype and the model minority myth. This was an eye-opening and enlightening program for all.

HISPANIC HERITAGE MONTH

From September 15 – October 15, 2022, Burr & Forman celebrated Hispanic Heritage Month by honoring the rich cultural legacy of the Hispanic community. This year's Hispanic Heritage Month program included a discussion by Burr's Hispanic employees on the diversity of their culture and their shared language that continues to build bridges of unity. During the two-part series, Gonzalo Gándara, Ereina Guzmán, and Sara Solano, discussed their varied cultural backgrounds, family traditions, and explored a light-hearted <u>English Speaker's Guide to Proper Spanish</u> <u>Pronunciation</u> that can be found on our website.



INDIGENOUS PEOPLES' DAY

Burr & Forman invited Luana M. Graves Sellars, founder of the nonprofit Lowcountry Gullah Foundation, to share the historical contributions of the Gullah people to the United States' economic growth, technological developments, and language. As a community activist, cultural influencer, and subject matter expert on Gullah Geechee culture, Luana showcased why Gullah customs and traditions are American indigenous culture during the hourlong webinar for Burr & Forman's clients and staff.

NATIVE AMERICAN HERITAGE MONTH

To celebrate Native American Heritage Month, Burr & Forman paid homage to the variegated histories, achievements, and contributions of Native Americans nationally. As we explored the diverse traditions of America's first people, we encouraged our attorneys and staff to become familiar with their collective story by sharing resources on some lesser-known, but critical aspects of the Native American experience from the time of Columbus to the present.

VETERANS DAY SOCIAL

On Veterans Day, we honored America's veterans for their love of country, patriotism, and sacrifice for the common good. Burr & Forman proudly co-sponsored a Veterans Day Networking Social hosted by the South Carolina Bar Association's Military & Veterans' Law Section and USC School of Law's Veterans in Law Society and service members.



Veterans Day Networking Social

Affinity Groups

Burr & Forman's Affinity Group Program provides resources and tools for business development and career advancement. Through firm-sponsored seminars, social events, and discussion groups, diverse attorneys across all offices are able to come together to form internal networks, address unique needs of their communities, and collaborate on professional development. With the launch of the Hispanic/Latinx and Veterans groups this year, Burr & Forman now formally recognizes eight affinity groups.

AFFINITY GROUP LEADERS





Asian American Attorney Affinity Group Co-Chairs

Ingu Hwang Partner - Montgomery

Bhumi Patel Partner - Myrtle Beach



Black/African American Attorney Affinity Group Co-Chairs

Kermit Kendrick Partner - Birmingham

James Roberts Partner - Birmingham





Hispanic/Latinx Attorney Affinity Group Co-Chairs

Gonzalo Gándara Law Clerk - Orlando

Sara Solano Associate -Ft. Lauderdale



LGBTQ+ Affinity Group Chair

Flizabeth "Beth" Davis Partner - Atlanta



Multiracial Attorney Affinity Group Co-Chairs

Michael Choy Partner – Birmingham



Ronald "Scott" Williams Partner - Birmingham



Social Justice Initiative (SJI) Affinity Group Chair

Tamika Walters CDIO - Atlanta



Bill Daniels Partner - Mobile

Lance Lawson Partner - Charlotte



en's Initiative Co-Chairs Wor

Briana Montminy Partner - Nashville Elizabeth "Beth" Shirley Partner – Birmingham

Affinity Group Highlights

WOMEN'S INITIATIVE

On February 25, 2022, the Women's Initiative organized a breakfast during the Firm retreat in Las Vegas. Women attorneys were able to connect with colleagues from across the Firm while highlighting individual concerns and successes. Input gathered at the event helped to set the agenda for the remainder of the year.

In April, the Women's Initiative hosted a panel discussion on advancement. Firm leaders, Ed Christian (CEO), Zachary Miller (Partner and former EC Member), Jennifer Moseley (EC Member), and Ricardo Woods (EC Member and DEI Committee Co-Chair) shared their professional development strategies and added transparency to the Firm's partner promotion process.

On September 13, 2022, the Women's Initiative sponsored a Business Development Luncheon featuring a presentation by CMO Kathryn Whitaker and a panel discussion with Partners Lindsey Arnold and Ginger Busby. Topics included the unique strategies, advantages and challenges that women face when networking and building client relationships.



Women's Initiative Advancement Panelists

BLACK/AFRICAN AMERICAN ATTORNEY AFFINITY GROUP

Our Black/African American Affinity Group held monthly meetings throughout the year. Discussions on recruitment, retention, professional development, and career advancement yielded innovative programming and strategic planning. This group coordinated and led various campus engagement activities, including organizing two seminars for the Black Law and Asian Pacific American Student's Associations at the University of Alabama School of Law. Our attorneys provided diverse members of these student groups with valuable insight into exam preparation, networking, and interviewing. James Roberts, Partner and Co-Chair of the affinity group, hosted the inaugural Black/African American Group Retreat in Birmingham, AL. The twoday event in September gave our attorneys from various offices an opportunity to fellowship, network, and collaborate. Professional, business, and brand development seminars led by CEO Ed Christian, Burr & Forman Partners, Derek Meek, and Ricardo Woods provided valuable knowledge.



Black/African American Retreat Business Development Session

Members from our Women's Initiative & Multiracial Attorney Affinity Group also joined in on the festivities during our mixer and dinner to celebrate a successful retreat.

HOLIDAY CELEBRATIONS

During the holiday season, our Affinity Group leaders held celebrations. It was an opportunity for members to spend time together and share holiday traditions. The Asian American Attorney Affinity Group sent aromatic East and Southeast Asian food starter sets to each member. The Multiracial Attorney Affinity Group held a virtual cocktail party with winter-themed spirits, and the Hispanic/Latinx Attorney Affinity Group leaders opened their community-building festivities to staff members and hosted a holiday luncheon.

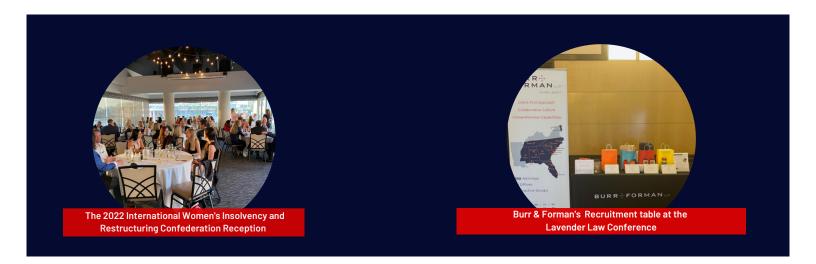
Supporting Burr's Diverse Attorneys

As a firm, we take pride in establishing sponsorships driven by our attorneys. Sustaining meaningful connections with impactful organizations allows us to support diversity and engage with community members throughout our footprint and beyond. Leadership opportunities through sponsorships are paramount in driving engagement that assists our attorneys in expanding their professional networks. Burr & Forman took the distinct pleasure of sponsoring the following organizations and conferences in 2022:

National Sponsorships	 National Association of Women Lawyers National LGBTQ Bar Association's Annual Lavender Law Conference and Career Fair
Local & Regional Sponsorships	 Annual Convention of the Southeastern Region of the National Black Law Students Association
	Annual Gala of the Georgia Asian Pacific American Bar Association
	Diversity Fair of the Hillsborough County Bar Association in Tampa, FL
	 Scholarship Banquet of the George Edgecomb Bar Association in Tampa, FL
	Scholarship Banquet of the Magic City Bar Association in Birmingham, AL
	Stonewall Bar Association of Georgia

DIVERSE BAR ASSOCIATIONS AND EVENTS

In addition to these sponsorships, the Firm continued to support attorney memberships in numerous bar associations that address their unique professional development objectives. We also sent diverse attorneys to numerous conferences for networking purposes, including the Influence & Power in Law Conference, Lavender Law Conference, the Women's Foundation of Alabama's Clearing the Path Showcase, and the International Women's Insolvency and Restructuring Confederation.



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Recruiting & Pipeline Initiatives

2022 PRE-LAW PROGRAM

Burr & Forman's Pre-Law Program is an internship opportunity for college students of diverse backgrounds who have demonstrated interest in law school. The Pre-Law Program helps prepare students for law school admissions and attendance and aids the Firm's goal of creating a pipeline of diverse talent. Our 2022 Pre-Law Program took place over four weeks from Monday, June 6 – Friday, July 1. We had 12 paid interns working from the following offices: Atlanta, Birmingham, Columbia, and Nashville. The robust calendar of events included instruction and activities covering at least four areas:

LAW SCHOOL	LAW FIRM LIFE	LEGAL CAREERS	PRACTICAL SKILLS
 Law School Class	 Practice Group Info	 Judge Presentations	 Soft Skills for
Demo Law School Admissions Info Case Analysis	Sessions Mentorships Legal Industry Trends	& Courthouse Tours Attorney General Panel In-house Counsel Panels	Success Networking Oral Argument

INAUGURAL DIVERSITY FELLOWSHIP

As part of our commitment to DEI, it is essential to aid students from underrepresented backgrounds in the law. This year, we announced the first two recipients of the Burr & Forman 2022 Diversity Fellowship. Elena Maestas and Jamie Sipp worked in our Birmingham and Atlanta offices as Law Clerks and were exceptional. As first-generation college graduates and now law school students, their unwavering commitment to achieving academic excellence and pursuing purposeful career development opportunities has set them on a path of success. To support Elena and Jamie's educational endeavors, our firm awarded each of them a \$4,000 scholarship and mentorship by two of our remarkable partners.



Diversity Fellowship Recipients & Firm Leadership



Nashville Pre-Law Interns with Judge Bennett

"I think programs like this are so important to breaking down barriers for accessibility. I think it's a blessing to be able to participate in something like this. I am grateful to the Firm for creating space for people who have not typically had access in this way. Equally important, I think the conversations that we had as a cohort were really insightful. I think even though we come from all types of different kinds of backgrounds – religion, race, gender–, all these different factors, I think we still find a lot of commonality among each other, and, in that commonality, I think we find room to grow together."

– Tyger Quarles, 2022 Pre-Law Intern

Community Impact

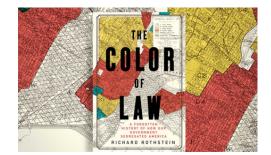
SOCIAL JUSTICE INITIATIVE

Founded in 2021 in response to the uprisings of 2020, Burr & Forman's Social Justice Initiative (SJI) is charged with leading efforts to advance social justice in our Firm, our communities, and our legal system. In 2022, SJI provided multiple opportunities to learn about the history of inequities and provide tangible support to those in need.

Burr & Forman's Social Justice Initiative completed its first-ever Spring Food Drive. Donors in Atlanta, Charleston, Columbia, Greenville, Orlando, and Tampa supported the effort. Thanks to their contributions, Burr & Forman raised over \$3000 and collected food items for multiple local charities. This event was an excellent opportunity to help the most vulnerable in our communities.



SJI organized a firm-wide book club to read, *The Color of Law: A Forgotten History of How our Government Segregated America* by Richard Rothstein. The book examines how the U.S. government, in concert with prominent businesses, unconstitutionally segregated every major metropolitan area in America through law and policy.





Critical Race Theory Panelists

SJI hosted a webinar on Critical Race Theory. Panelists included Dr. Jonathan Grant, Assistant Professor of Sociology and Africana Studies at the University of North Florida, and Professor Brant Lee, Assistant Dean for Diversity and Social Justice Initiatives at the University of Akron School of Law. The Firm's Chief Diversity & Inclusion Officer, Tamika Walters, moderated the discussion on the origins and key elements of Critical Race Theory, recent controversies, and the role of Critical Race Theory in understanding American history and contemporary racial inequities.

Community Impact

One of the most paramount rights granted to Americans is the right to vote. Our history has proven that voters are the catalyst for change and are essential to democracy. During the mid-term election, the Burr & Forman Social Justice Initiative distributed early in-person voting and ballot information across the Firm.

SJI supported the NAACP's Legal Defense Fund through a charitable giving campaign due to the broad-based initiatives offered. The Legal Defense Fund (LDF) is America's premier legal organization fighting for racial justice. Burr's \$2000 contribution will help to defend and advance political participation, economic justice, criminal justice, and educational equity.

Burr & Forman hosted a Day of Remembrance to encourage reflection on past injustices and remind all of the need for continued social justice advocacy. Attorneys and staff across multiple locations participated in different activities to commemorate the event. Some of those activities included a trip to the Florida Holocaust Museum, the Milestone Walking Tour at the Birmingham Civil Rights Institute, a tour of the Levine Museum of the New South in Charlotte, a visit to the Mississippi Civil Rights Museum, and a guided tour of the Martin Luther King National Park in Atlanta.



EVERY VOTE Matters.

BE COUNTED.

DEI Committee

Burr & Forman's DEI Committee works to promote and cultivate a culture of diversity, equity, and inclusion that permeates the Firm's policies and practices. The committee is comprised of partners, attorneys, and staff from across the Firm's geographic footprint who have taken significant leadership roles to advance DEI initiatives. Their individual and collective involvement with professional and civic organizations has helped to shape the Firm's impact on its surrounding communities. Here are some highlights of their activities in 2022.

Mobile Partner, Ricardo Woods, who is a Co-Chair of the DEI Committee, also chaired DRI's Diversity & Inclusion Committee. This year, the Diversity & Inclusion Committee started a mentoring program designed for high-potential, early-career civil defense attorneys from historically underrepresented groups. The program is designed to partner in-house and outside counsel mentors with mentees to provide practical tools for developing and leveraging relationship-building skills applicable to law firm practice.

Birmingham Partner, Bryan Balogh, served his third year on the Alabama State Bar's Diversity and Inclusion Committee. It is a Committee appointed annually by the President of the Alabama State Bar to advance the principles of diversity within the profession and to broaden the inclusion of all Bar members.

Atlanta Partner, Elizabeth "Beth" Davis, is a Board Member and Secretary of the National LGBT Bar Foundation and a member of Lambda Legal's National Leadership Council. Beth presented on the panel, "Promoting Inclusion and Diversity in the Workplace," during DRI's 2022 Life, Health, Disability, and ERISA Seminar, in Nashville. Panelists addressed the benefits of diverse teams, the challenges of achieving a sense of belonging for all, and practical guidance on ways to promote inclusion.

In September, Beth Davis and CDIO Tamika Walters led a roundtable discussion during the 2022 Driving Diversity in Law & Leadership Summit in Atlanta, GA, an event sponsored by corporate legal departments, Burr & Forman, and other law firms. The topic of the discussion was the "Role of Training in Advancing DEI Initiatives." Participants left with an understanding of how bias operates in work allocation and professional development, and they analyzed the critical nature of standardized training to counteract that bias. Also in September, Tampa Partner Jacqueline Simms-Petredis, and Associate Whynter Morgan-Neal, attended the annual meeting and CLE program of the Virgil Hawkins Florida Chapter of the National Bar Association, an event co-sponsored by Burr & Forman.

In October, Francenia "Frannie" Heizer, Co-Chair of Burr & Forman's DEI Committee and member of the Firm's Mansfield Certification Task Force, attended Diversity Lab's Knowledge Sharing Forum in San Francisco to collaborate with law firm representatives and inhouse counsel on winning strategies for increasing diversity in leadership.

Birmingham Associate, Denzel Okinedo, helped to establish the Magic City Bar Associations' (MCBA) Young Lawyers Committee with the goal of encouraging the interest and participation of young lawyers in the activities, objectives, and purpose of the MCBA. This year the committee hosted multiple mixers across the City of Birmingham that allowed attorneys of color to connect, network, and grow professionally. The 2022 MCBA Law Student Reception was held at Burr's Birmingham office, and was open to all pre-laws, clerks, law students, and attorneys. The event connected summer clerks with local leaders in the Magic City Bar Association, and displayed the rich and diverse history of Birmingham's legal profession.



Denzel Okinedo Welcome Address at the MCBA Law Student Reception

Throughout the year, Atlanta Partner, Tala Amirfazli, has provided pro bono services to Kids In Need of Defense (KIND), a preeminent U.S.-based nongovernmental organization. Tala offers legal counsel to unaccompanied and separated migrant children as they navigate the immigration system. Her work helps ensure that refugee and immigrant children receive their right to due process and fundamental fairness, resulting in equitable outcomes.

DEI Committee Members



Frannie Heizer Partner - Columbia



Ricardo Woods Partner - Mobile



Jonathan Brown Partner – Ft. Lauderdale



Ken Bryant Partner - Nashville







Jennifer "Ginger" Busby

Partner - Birmingham

Tala Amirfazli

Partner - Atlanta

Joseph Letzer Partner - Birmingham



Dana Robbins Associate - Tampa



Adam Artigliere Partner - Greenville



Partner - Columbia



Heather Jamison Partner - Birmingham



Kermit Kendrick Partner - Birmingham



Armando Nozzolillo Partner - Jacksonville





Denzel Okinedo Associate - Birmingham



Ronald "Scott" Williams Partner - Birmingham



Elizabeth "Beth" Davis

Partner - Atlanta

Briana Montminy Partner - Nashville



James Roberts Partner - Birmingham



Jennifer Moseley

Partner - Atlanta

Elizabeth "Beth" Shirley Partner - Birmingham





2022 DEI Award Recipients

2022 DEI All-Stars

In recognition of indispensable contributions, unwavering support, and helping to sustain all DEI initiatives.



Associate-Birmingham



James Roberts Partner - Birmingham

2022 DEI Champions

In recognition of significant, ongoing support to DEI initiatives.



Elizabeth "Beth" Davis Partner - Atlanta



April Mason Partner - Birmingham



Briana Montminv Partner – Nashville

2022 DEI Advocates

In recognition of substantial contributions to DEI programs or serving in leadership roles for an ongoing initiative.

Tala Amirfazli Christine Burns-Brown Cayman Caven Ashmin Chowdhury **Michael Choy Bill Daniels** Gonzalo Gándara Derek Meek **Guirlaine Gregory** Will Hereford Ingu Hwang Kermit Kendrick Hanna Lahr Lance Lawson Maia Middleton Denzel Okinedo **Bhumi Patel** Joel "Jay" Price, Jr. Chandler Pyke Kinette Salter Elizabeth Shirley Jacqueline Simms-Petredis Angie Smith Mallie Smith Sara Solano Helen Walker Brooke Watson Kathryn Whitaker Ronald "Scott" Williams

2022 DEI Supporters

In recognition of individuals who regularly engage with DEI programs, trainings and events.

Lisa Arrington Sarah Berry Tammy Blankenship John Carroll Kaki Corry M. Elizabeth Crum Donna Dozier Ereina Guzmán Jessica Haarsgaard Heather Jamison John Lassiter Ashley Lightsey **Rob Neilson** Armando Nozzolillo Priscilla Rodriguez **Michael Scardato Michael Smith Jackie Spivey David Tigges**

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