175

UNUM GROUP

A Milestone for Momentum

The Anniversary Forum

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AVP, Enterprise Communications
Unum Group

Dec. 4, 2024

Unum Group: A diversified employee benefits leader

- 1 **U.S. Disability** (Individual and Group)
- 1 **U.K. Disability**
- 2 **U.S. Voluntary Benefits** (Unum and Colonial Life)
- 4 **U.S. Life** (Unum and Colonial Life)

Helping the working world thrive throughout life's moments®

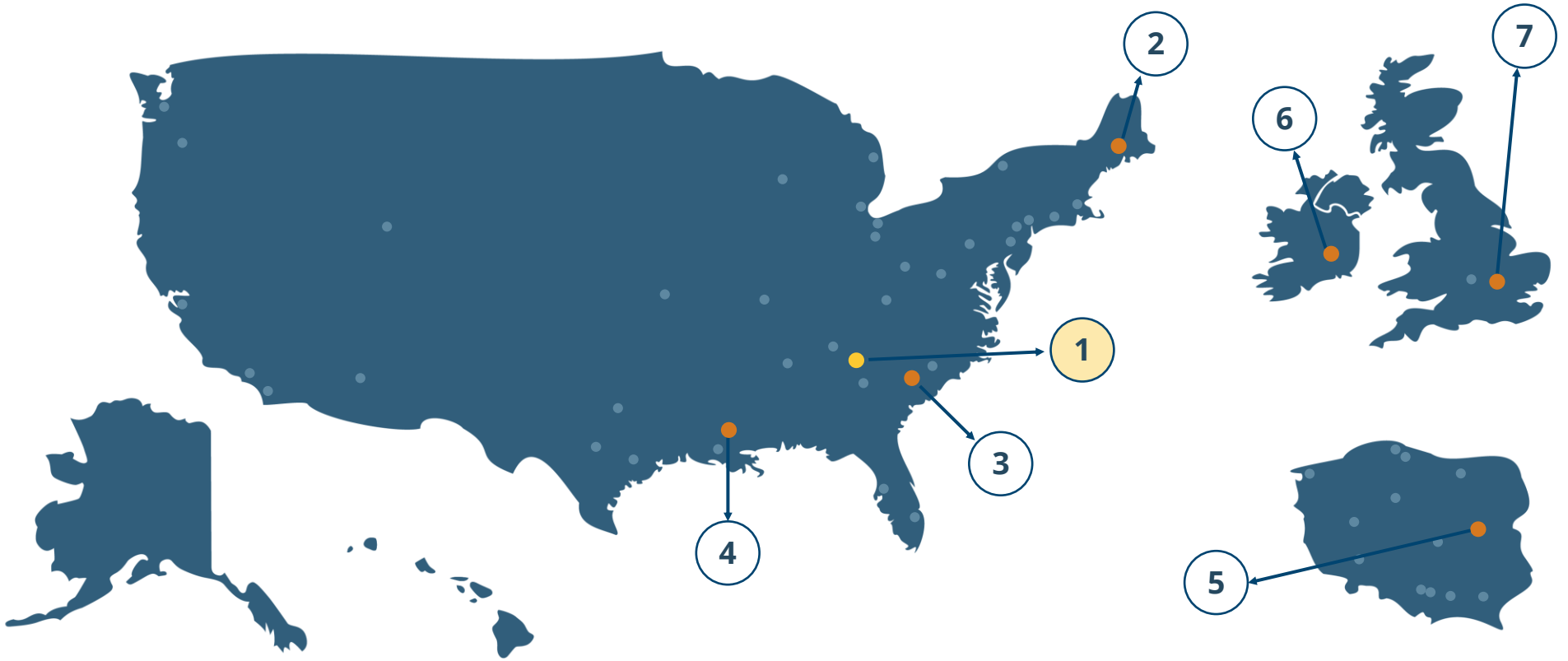
Delivered
$8 billion
in benefits in 2023

Protecting
45 million
workers and their families

Serve more than
174,000
companies
as they attract, protect and retain employees

Helped more than
292,000
individuals
return to work in 2023

Where we work



1 **CHATTANOOGA**
Tennessee
(Headquarters)

2 **PORTLAND**
Maine

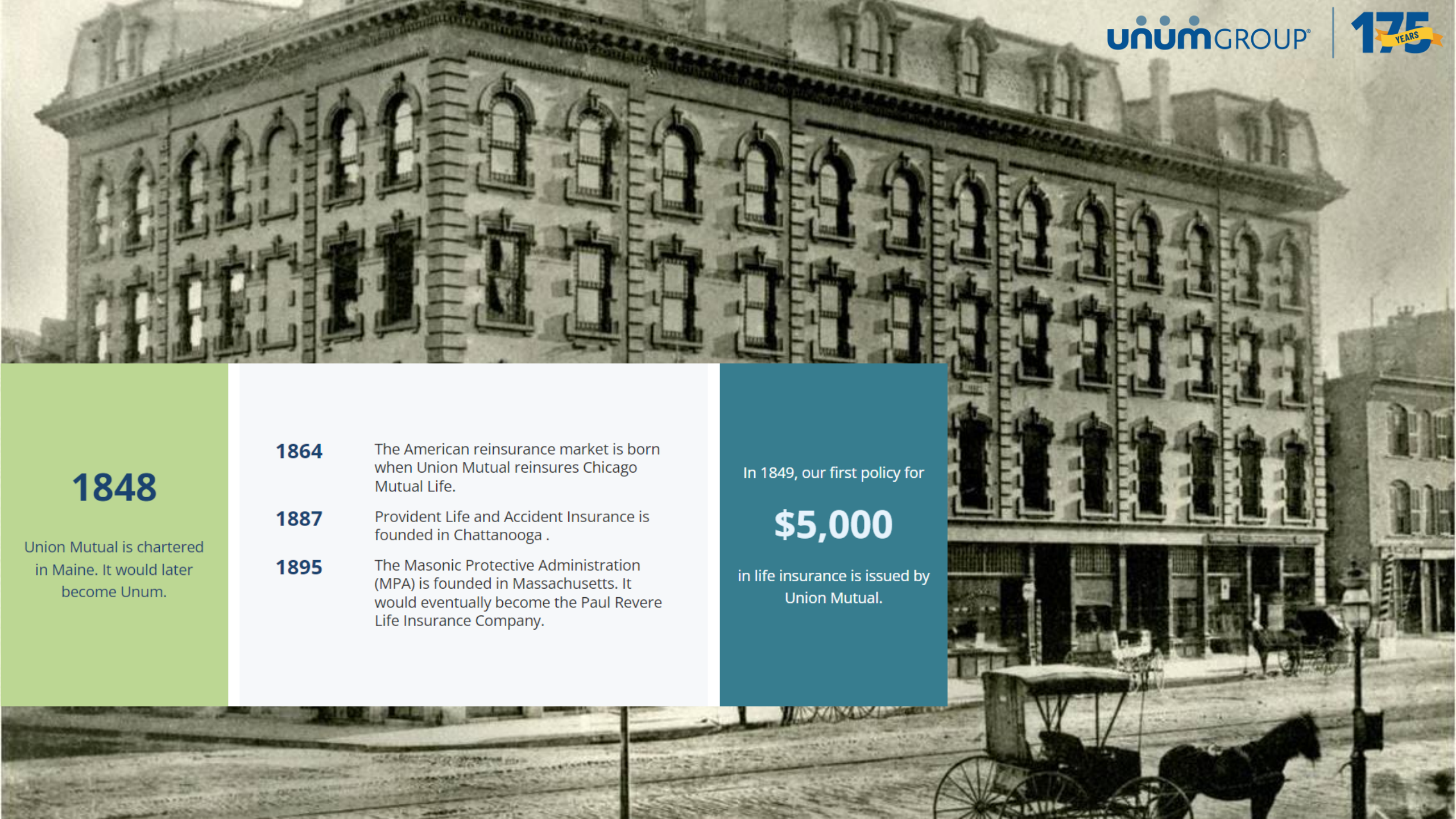
3 **COLUMBIA**
South Carolina

4 **BATON ROUGE**
Louisiana

5 **DORKING**
United Kingdom

6 **CARLOW**
Ireland

7 **WARSAW**
Poland



1848

Union Mutual is chartered in Maine. It would later become Unum.

1864 The American reinsurance market is born when Union Mutual reinsures Chicago Mutual Life.

1887 Provident Life and Accident Insurance is founded in Chattanooga .

1895 The Masonic Protective Administration (MPA) is founded in Massachusetts. It would eventually become the Paul Revere Life Insurance Company.

In 1849, our first policy for

$5,000

in life insurance is issued by Union Mutual.

175 Years of Helping People Thrive

Guiding Principles

- Recognize our **heritage**
- Strengthen our **culture & reputation**
- Leverage milestone to **gather and celebrate** together throughout 2023

Celebrate Customers

Engage Employees

Reach Communities

Enhance Reputation

Crafting a Memorable Milestone Campaign

1. **Start with Purpose**
   Guiding filter throughout the campaign
2. **Targeted Strategy**
   Define clear scope and key audience segments
3. **Curated Creativity**
   Prioritize editing over abundance of ideas
4. **Seamless Integration**
   Infuse the campaign into the everyday
5. **Delight Factor**
   Create unexpected moments to captivate audience

Unum 175 Campaign Roadmap

	Q1	Q2	Q3	Q4
Planning & Production	**Approvals** **Campaign development & production**			
Live Activations		Anthem Premiere at Town Halls NYSE bell ringing	Campus celebrations Unum Nights at the Ballpark	
		Customer appreciation events / Integration with conference schedule		
Internal Content	**Announcement** **Internal Editorial Content campaign**			
		Commemorative gift store for employees		
External Comms.	**Earned media campaign** **Social media engagement**			
		Local advertising in home markets		
Community Engagement	**Corporate Social Responsibility** – 175 Caring Spirit Moments			
		Corporate Giving – 175th community grants		

Engage Employees

ENGAGING CONTENT

Inside article series

- History
- Employees
- Community

Videos

- 175 *What If* Anthem
- Montage
- Holiday

Engage Employees

10 ANNIVERSARY EVENTS

U.S.
3 campus celebrations
Chattanooga - Columbia - Portland

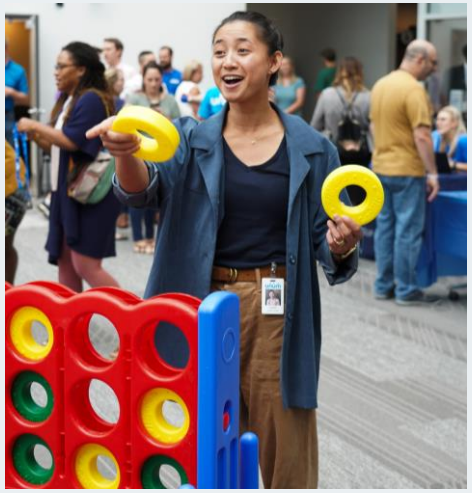
3 cupcake celebrations
Atlanta - Baton Rouge – Worcester

U.K.
Cupcake celebration in July
BBQ celebration during board meeting

Ireland
Cupcake celebration with CSR BBQ

Poland
Celebrated with Unum's 5th anniversary

77%
of employees attended a celebration event in their home campus



Engage Employees

UNUM NIGHTS

+ 2,700
baseball tickets given to employees and their families

COMMEMORATIVE GIFTS

~90%
of employees redeemed their 175 commemorative gift

CUSTOMER SERVICE WEEK

Celebrated our employees
unwavering customer focus

Community Impact

We reached our goal of
175 CARING SPIRIT MOMENTS
by **midyear** and **surpassed 500** by **year end**

Community Impact

COMMEMORATIVE GRANTS

Celebrated our 175th anniversary by awarding three commemorative grants of $175,000 each to community partners.

Portland, Maine

Boys and Girls Club of Southern Maine, provides summer and after-school programs Monday through Friday to 3,000 members ages 6-18 who attend their Clubs each year.

Chattanooga, Tennessee

The Austin Hatcher Foundation for Pediatric Cancer provides support to children and their families at no cost to help them cope and thrive throughout the journey to recovery.

Columbia, South Carolina

The Big Red Barn Retreat (BRBR) provides free nonclinical services, programs, and training for veterans, including Warrior PATHH and Struggle Well.

Community Impact

COMMEMORATIVE GRANTS

An additional $175,000 was distributed in communities where we have smaller offices.

Atlanta, GA

Baton Rouge, LA

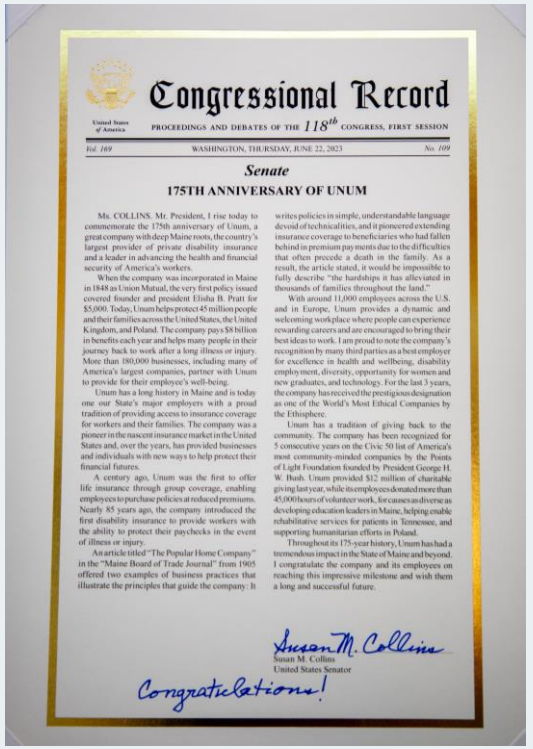
Worcester, MA

Enhance Reputation

CELEBRATING ON WALL STREET

LOCAL ADVERTISING

CONGRESSIONAL SENTIMENTS



Congressional Record

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Vol. 169 — WASHINGTON, THURSDAY, JUNE 22, 2023 — No. 109

Senate

175TH ANNIVERSARY OF UNUM

Ms. COLLINS. Mr. President, I rise today to commemorate the 175th anniversary of Unum, a great company with deep Maine roots, the country's largest provider of private disability insurance and a leader in advancing the health and financial security of America's workers.

When the company was incorporated in Maine in 1848 as Union Mutual, the very first policy issued covered founder and president Elisha B. Pratt for $5,000. Today, Unum helps protect 45 million people and their families across the United States, the United Kingdom, and Poland. The company pays $8 billion in benefits each year and helps many people in their journey back to work after a long illness or injury. More than 180,000 businesses, including many of America's largest companies, partner with Unum to provide for their employee's well-being.

Unum has a long history in Maine and is today one our State's major employers with a proud tradition of providing access to insurance coverage for workers and their families. The company was a pioneer in the nascent insurance market in the United States and, over the years, has provided businesses and individuals with new ways to help protect their financial futures.

A century ago, Unum was the first to offer life insurance through group coverage, enabling employees to purchase policies at reduced premiums. Nearly 85 years ago, the company introduced the first disability insurance to provide workers with the ability to protect their paychecks in the event of illness or injury.

An article titled "The Popular Home Company" in the "Maine Board of Trade Journal" from 1905 offered two examples of business practices that illustrate the principles that guide the company. It writes policies in simple, understandable language devoid of technicalities, and it pioneered extending insurance coverage to beneficiaries who had fallen behind in premium payments due to the difficulties that often precede a death in the family. As a result, the article stated, it would be impossible to fully describe "the hardships it has alleviated in thousands of families throughout the land."

With around 11,000 employees across the U.S. and in Europe, Unum provides a dynamic and welcoming workplace where people can experience rewarding careers and are encouraged to bring their best ideas to work. I am proud to note the company's recognition by many third parties as a best employer for excellence in health and wellbeing, disability employment, diversity, opportunity for women and new graduates, and technology. For the last 3 years, the company has received the prestigious designation as one of the World's Most Ethical Companies by the Ethisphere.

Unum has a tradition of giving back to the community. The company has been recognized for 5 consecutive years on the Civic 50 list of America's most community-minded companies by the Points of Light Foundation founded by President George H. W. Bush. Unum provided $12 million of charitable giving last year, while its employees donated more than 45,000 hours of volunteer work, for causes as diverse as developing education leaders in Maine, helping enable rehabilitative services for patients in Tennessee, and supporting humanitarian efforts in Poland.

Throughout its 175-year history, Unum has had a tremendous impact in the State of Maine and beyond. I congratulate the company and its employees on reaching this impressive milestone and wish them a long and successful future.

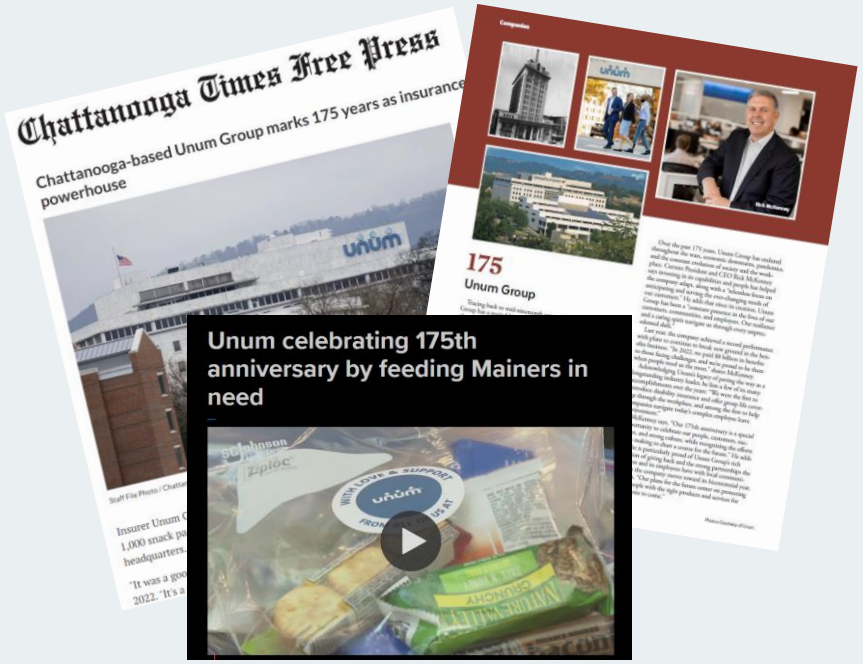
Susan M. Collins

Susan M. Collins
United States Senator

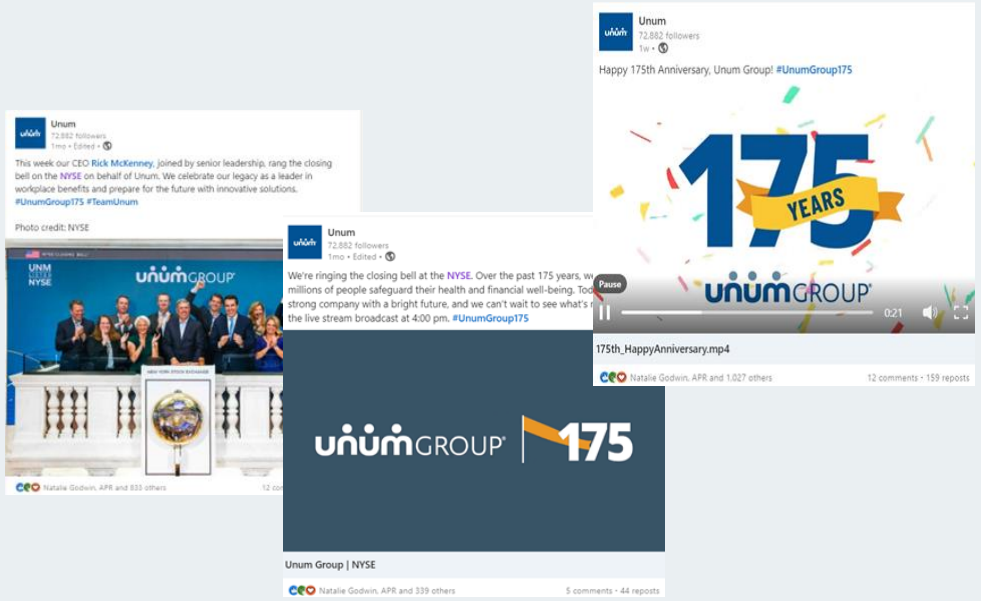
Congratulations!

Enhance Reputation

EARNED MEDIA



UNPRECEDENTED SOCIAL ENGAGEMENT



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4:00:40
CNBC
NYSE
CNBC
NYSE
NEW YORK STOCK EXCHANGE
unumGROUP