

# APPENDIX A

## ESG SNAPSHOT

This ESG Snapshot includes metrics for the entire company, including all of its business operations as a whole. Information provided for 2023, where available, is as of or for the nine months ended September 30, 2023.

		2023	2022	2021	2020
<b>ECONOMIC</b>					
Financial Performance	Total Revenues (millions)	\$2,089,353	\$2,720,133	\$2,709.7	\$2,217.5
	Net Income (millions)	\$424.6	\$373.0	\$373.4	\$386.2
	Diluted Earnings Per Share	\$11.65	\$9.74	\$9.38	\$9.57
	Dividends Declared Per Share	\$1.95	\$2.20	\$1.88	\$1.60
	Total Assets (millions)	\$14,433	\$15,349	\$16,123	\$14,905
	Net Operating Income Return on Adjusted Stockholders' Equity (ROAE)	26.4%	25.7%	24.3%	24.7%
	Net Investment Income (millions)	\$98.2	\$93.1	\$80.6	\$83.8
Life Insurance	Number of Policies Issued	270,103	291,918	323,855	352,868
	Face Amount Issued (billions)	\$89.8	\$103.8	\$108.5	\$109.4
	Number of Policies in Force	2,948,209	2,896,667	2,885,963	2,787,992
	Term Life Insurance Face Amount in Force (billions)	\$937.9	\$916.8	\$903.4	\$858.8
Investments	Total Investment Sales (billions)	\$6.8	\$10.0	\$11.7	\$7.8
	Client Asset Values at Period End (billions)	\$89.0	\$83.9	\$97.3	\$81.5
<b>SOCIAL</b>					
Workforce Data	Total Workforce Headcount	*	3,392	3,117	2,230
	Percent Women in Workforce	*	63%	63%	63%
	Percent Women Officers	*	47.5	45%	46%
	Employee Retention Rate	*	85%	89%	92%
	Employee Turnover Rate	*	14.9%	n/c <sup>2</sup>	n/c <sup>2</sup>
	Average Tenure of Senior Leadership Team <sup>1</sup>	*	25.4	22.9	31.5
Sales Force Data	Size of Life-Insurance Licensed Sales Force (end of period)	139,053	135,2083	129,515	134,907 <sup>3</sup>
	Number of New Recruits	271,933	359,735	349,374	400,345
	Number of Newly Life-Insurance Licensed Representatives	36,067	45,147	39,622	48,106
	Percent Women Life-Insurance Licensed Sales Force	59%	59%	57%	56%
	Percent Women Recruits	62%	62%	63%	60%
	Percent Women Newly Life-Insurance Licensed	62%	62%	64%	62%
Supplier Management & Diversity	Supplier Management Policy (y/n)	Y	Y	Y	Y
Human Rights & Ethics	<a href="#">Human Rights Statement</a>	Y	N	N	N
	<a href="#">Code of Conduct (y/n)</a>	Y	Y	Y	Y
	<a href="#">Equal Employment Opportunity Policy</a> – Standalone (y/n)	Y	Y	Y	Y
	<a href="#">Anti-Bribery &amp; Anti-Corruption Policy (y/n)</a>	Y	Y	Y	Y
	<a href="#">Whistleblowing and Non-Retaliation Policy (y/n)</a>	Y	Y	Y	Y
Charitable Giving	The Primerica Foundation and Primerica, Inc. (millions)	*	\$2.1	\$2.0	\$2.3

\* Unavailable because relates to full year 2023.

1. Year-end average tenure of our senior leaders as found in our Annual Report on Form 10-K for the stated year. 2. Not calculated. 3. Number of life insurance-licensed independent sales representatives at December 31, 2020 includes 3,597 temporary licenses that were issued in response to the COVID-19 pandemic and 2,508 licenses that were extended due to the COVID-19 pandemic.

# APPENDIX A (CONTINUED)

		2023	2022	2021	2020
<b>GOVERNANCE<sup>4</sup></b>					
Board Composition & Independence	Size of the Board (Number of Nominees Elected at the Annual Meeting)	10	11	11	11
	Board Average Age	62.0	62.3	63.7	62.7
	Mandatory Retirement Age (y/n)	Y	Y	Y	Y
	Average Director Tenure	8.8	8.2 <sup>5</sup>	7.6	7.3
	Independence of Committees (Other than Executive Committee (y/n)	Y	Y	Y	Y
	Independent Chairman (y/n)	Y	Y	Y	N
	Independent Lead Director (y/n)	Y	Y	Y	Y
Board Diversity	Number of Women on the Board	4	4	3	3
	Percent of Directors Who Are Women	40%	36%	27%	27%
	Number of Directors with Racial/Ethnic Diversity	3	3	3	3
	Percent of Directors with Racial/Ethnic Diversity	30%	27%	27%	27%
Board and Committee Meetings	Number of Board and Committee Meetings During the Calendar Year	*	30	33	29
	Number of Directors Attending Less than 75 Percent of Meetings During the Calendar Year	0	0	0	0
	Executive Session (y/n)	Y	Y	Y	Y
	Executive Session of Independent Directors (y/n)	Y	Y	Y	Y
Stockholder Rights	Annual Election of Directors (y/n)	Y	Y	Y	Y
	Majority Voting Standard for Director Elections (y/n)	Y	Y	Y	Y
	Single Voting Class (y/n)	Y	Y	Y	Y
	Proxy Access (y/n)	Y	Y	Y	Y
	Poison Pill (y/n)	N	N	N	N
Executive Compensation	CEO Pay Ratio	75:1	95:1	102:1	84:1
	Clawback Provision for Executive Compensation (y/n)	Y	Y	Y	Y
	Double-Trigger Vesting Upon Change in Control (y/n)	Y	Y	Y	Y
	CEO Stock Ownership Guidelines (y/n)	Y	Y	Y	Y
	Required CEO Stock Ownership Multiple of Base Salary	5	5	5	5
	Senior Executive Member Stock Ownership Guidelines (y/n)	Y	Y	Y	Y
	Senior Executive Member Stock Ownership Multiple of Base Salary	2.5-3.5	2.5-3.5	2.5-3.5	2.5-3.5
	Director Stock Ownership Guidelines (y/n)	Y	Y	Y	Y
	Required Director Stock Ownership Multiple of Annual Cash Retainer	5	5	5	5
<b>ENVIRONMENTAL</b>					
Climate	TCFD Disclosure (y/n)	Y	Y	Y	Y
	CDP Carbon Disclosure (y/n)	N	N	N	N
GHG Emissions	Material GHG Emissions (y/n)	N	N	N	N
	Emissions Reduction Initiatives (y/n)	N	N	N	N

\* Unavailable because relates to full year 2023.

<sup>4</sup> As described in our proxy statement relating to the Annual Meeting of Stockholders (the “Annual Meeting”) held in the stated year. <sup>5</sup> Excludes Amber L. Cottle, who was elected to our Board at the Annual Meeting held on May 11, 2022.