

Celebrating
10
years

2018 ANNUAL REPORT



MOSSADAMS

FORUM W

BUSINESS RESOURCE GROUP
DIVERSITY & INCLUSION



CELEBRATING 10 YEARS OF FORUM W

In 2008, we took on a challenge to change the career experience for our women. Although we were hiring women into the firm at the same rate as men, women were leaving the firm at significantly higher numbers than men and were less represented at the partnership and firm leadership levels. To be the best firm we could be, we had to be strategic about transforming the Moss Adams experience for women. Thus, we created Forum W to prioritize our goals for advancing women within our firm and our profession.

For the first few years, Forum W focused on implementing programming, developing activities, and helping women build their networks. Today, we're broadening our focus on cultural impact by intentionally building an inclusive environment where all employees can thrive. We're focused on achieving measurable results while changing our culture.

As we celebrate Forum W's 10-year anniversary, we reflect on our successes and focus on using our learnings from the past decade to fuel our momentum in advancing women. We're honored to be called thought leaders in this space, and look forward to affecting change for the future in our firm, the profession, and the business world.



Chris Schmidt
CHAIRMAN AND CEO



Dave Follett
PRESIDENT AND COO



Jen Wyne
EXECUTIVE DIRECTOR OF
HUMAN RESOURCES

OUR APPROACH

When we launched Forum W, we made a promise that we'd be in it for the long haul. We knew that any effort to foster change would take time. For a decade, we've stayed true to our mission.

"Forum W is so genuinely a part of the Moss Adams fabric and it's paved the way for other diversity and inclusion initiatives that are equally important to our organization."

- Rebecca Pomeroy, Chief Practice Officer

MISSION

Accelerate the firm's success in attracting, developing, retaining, and advancing talented women.

PRIORITIES

DIALOGUE

Listen to women regarding their career goals and experiences at Moss Adams

NETWORKING

Build and leverage relationships to benefit individual and firm growth

MENTORING

Connect those who are developing with those who have already achieved

ADVANCEMENT

Provide ample growth opportunities and encourage the pursuit of leadership roles

GOALS

- Foster an inclusive culture that values and leverages our women's talents, voices, and ideas
- Make career and leadership development opportunities available at each level to strengthen our pipeline of women
- Increase the number of women partners and women in leadership roles
- Be known as a thought leader on developing and advancing women

As we continue this work, we're developing even bolder strategies to make a meaningful impact on the unique experiences of our women at every level. We'll continue to make Moss Adams an inclusive workplace where everyone feels valued, inspired, and empowered to go further—faster.

FROM INSIGHT TO ACTION

Forum W's success hinges on engaging in meaningful conversations with our women to understand how we can make Moss Adams a place where our women can thrive. We use these conversations to shape our evolving program. Four programs have proven to be key in learning how we can make impactful and lasting change for our firm and the industry.

GroWth Series

Now in its third year, the GroWth series is designed to strengthen our pipeline of women partners. This is a year-long leadership development program that consists of three one-and-a-half day-long sessions, each with an area of focus: Build Your Brand, Build Your Team, and Build Your Business. The target is high potential, one-to-two-year senior managers. Through this program, we inspire and motivate women to become leaders, expand their networks, and strengthen their leadership skills.

Getting Real Workshop: Straight Talk on Building Your Career and Investing in Your Future

This program combats future tripping—making premature career decisions based on how women think their personal and professional lives might unfold. Women three to six years into their careers are invited to attend. Since this concept launched six years ago, it's continued to evolve and adapt to the changing needs of women.

Path to Success Series

We created *A Guide for Mentors and Protégés*, *A Guide to Building and Leveraging Your Network*, and *Investing in Your Career by Helping Others* to help women build and maintain successful mentoring relationships and build external connections.

Accounting MOVE Project

As a founding sponsor of MOVE Project since 2010, we're helping to uncover strategies on how to develop and advance women in public accounting. This national study provides insight by measuring four factors essential to women's advancement: money, opportunity, vital work-life resources, and entrepreneurship.



"The GroWth program gave me an opportunity to connect with women peers who, in some way or another, can relate with my career path. I have the support system, and can be part of a support system, to navigate through unique challenges we face as women professionals. The networking and camaraderie has boosted my confidence and given me a better perspective on my career growth that I would not have otherwise had."

- Joan Taylor, Senior Manager



STRIVING FOR CULTURAL CHANGE

When we began Forum W, we created a three-step roadmap to success:

1. Determine what disruptions are necessary to create lasting cultural change.
2. Set realistic short, mid, and long-term goals for cultural change.
3. Create resources, programs, and policies to address how to grow and develop women.

We know our efforts are working because the tools and resources we've developed continue to evolve and transform as our people at all levels of the firm embrace them.

Succession Planning Playbook

This playbook provides recommendations on how to be more proactive in our efforts to increase the representation of women in significant leadership roles and at the partner level. It offers strategies to think critically about how individuals are identified and selected for leadership and development opportunities. This tool was designed to support leadership decisions at the top. We're now in the position to start using the principles of the Succession Planning Playbook across the firm and are excited to see how our efforts to change behavior continue to impact our culture.

Southern California & Phoenix (SCP) Region: Getting Real ► Being Brave

In 2018, our SCP region took the Getting Real Workshop to the next level. SCP wanted to continue building on the success they realized with the Getting Real program by listening to the needs of their staff. Updating the theme of the event to *Being Brave* and adding new content around managing guilt, emotional intelligence, and working mothers made the event feel fresh and sparked renewed energy in the region.

Forum W: Manufacturing & Consumer Products

Since 2008, our regionally based Forum W groups have been working at the local level to help women succeed at our firm. In 2018, Forum W: Manufacturing & Consumer Products (MCP), our first industry-based Forum W pilot group, launched with a goal of having 50 percent women leaders in MCP. This group will build on our existing firmwide and regional framework, successes, and strategies to advance women within their specific industry group at Moss Adams. This is an important next step for Forum W since career development and advancement are heavily influenced by industry specialization. By adding an industry group focus, it creates an additional avenue to accelerate advancement from local, firmwide, and industry group perspectives.

"When we're considering people for leadership roles at Moss Adams, we make a point to consider which women are capable, ready, or almost ready for the next step. We work very hard to make sure everyone is given the same opportunity—it's something that's extremely important to us."

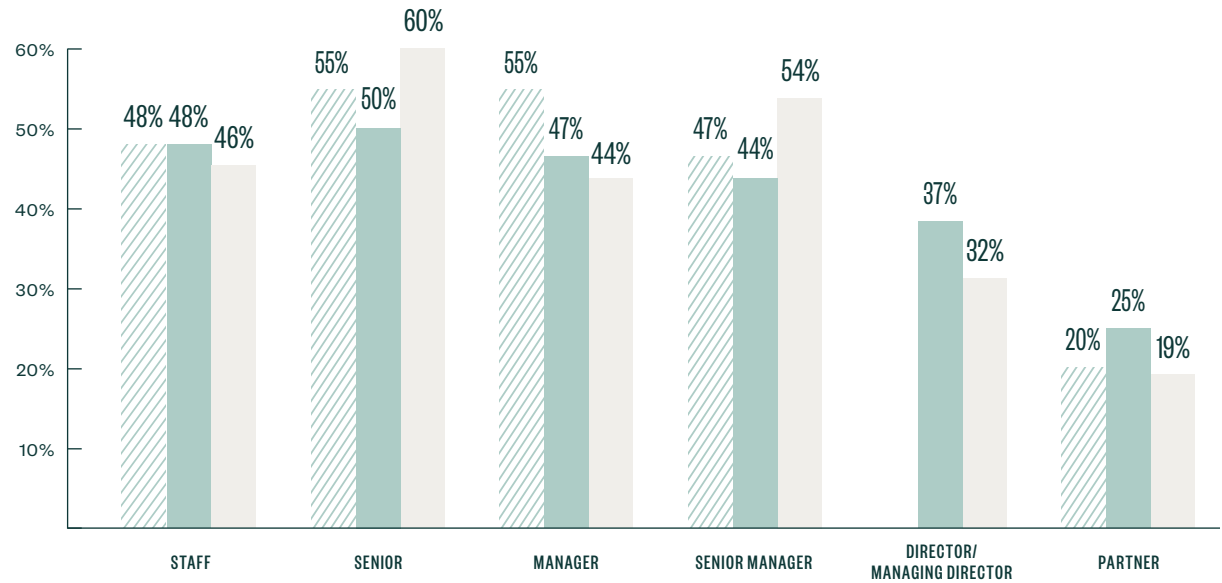
- Chris Schmidt, Chairman and CEO



OUR RESULTS

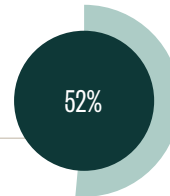
Since the beginning we've made a commitment to be transparent by measuring and sharing our progress. We continue to rank above industry average for number of women partners in the accounting industry, and our number of women in leadership roles continues to grow.

WOMEN AT MOSS ADAMS

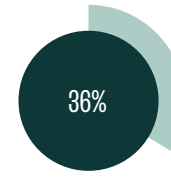


¹ Source: AICPA's 2017 CPA Firm Gender Survey
² Source: Delivering Through Diversity (McKinsey & Company, 2018)

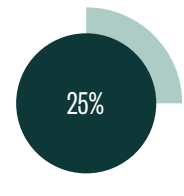
Companies with gender diversity among executive leadership teams were more likely to outperform on profitability and value creation.²



WOMEN
All employees at Moss Adams



WOMEN
National office leadership at Moss Adams



WOMEN
Partners at Moss Adams

22% industry average (all firms)¹

EMPLOYEE ENGAGEMENT

Measuring the advancement of women is only one indicator of success. We've seen a positive increase in how women feel about their experience at the firm.

Percentage improvement since 2009 in number of individuals who agree with the following statements:

25% ▲ Increase in the number of women who say Forum W is making a positive impact in their office.

10% ▲ Increase in the number of women who say they get fair consideration for staffing assignments.

10% ▲ Increase in the number of women who are proud to say they work for Moss Adams.

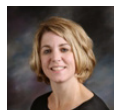
"It's critical our women know that we'll support them along the way—we'll believe in them, we'll invest in their development, and we'll be their advocate."

- Dan Cheyney, Partner



LEADING THE WAY

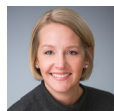
Having women at the top inspires other women to achieve and realize they can do it, too. Here are some women we look up to.



Darci Boyle
NATIONAL PRACTICE LEADER
Medical Groups & Physicians Practice
Portland, OR



Erica Coogan
PARTNER IN CHARGE
Moss Adams Wealth Advisors



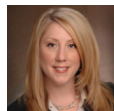
Julie Desimone
NATIONAL PRACTICE LEADER
Energy & Utilities Practice, Executive Committee
Portland, OR



Elizabeth Dollar
NATIONAL PRACTICE LEADER
Not-for-Profit Practice
San Francisco, CA



Elaine Ervin
NATIONAL PRACTICE LEADER
Construction Practice
Seattle, WA



Melissa Harman
NATIONAL PRACTICE LEADER
Higher Education Practice
Los Angeles, CA



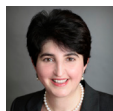
Dena Herbolich
NATIONAL PRACTICE LEADER
Professional Services Practice
Seattle, WA



Justine Hunter
NATIONAL PRACTICE LEADER
Restaurants Practice
Los Angeles, CA



Megan McFarland
PARTNER IN CHARGE
Dallas, TX



Bertha Minnihan
SPECIALTY PRACTICE LEADER
Benefit Plans Practice
San Francisco, CA



Rebecca Pomeroy
CHIEF PRACTICE OFFICER
National Office



Rhonda Powell
FIRM DIRECTOR OF TAX SERVICES
National Office



Tasha Repp
NATIONAL PRACTICE LEADER
Tribal & Gaming Practice
Bellingham, WA



Amy Runge
NATIONAL PRACTICE LEADER
Long-Term Care Practice
San Francisco, CA



Laurie Tish
NATIONAL PRACTICE LEADER
Government Practice
Seattle, WA



Piper Turner
EXECUTIVE DIRECTOR OF MARKETING
National Office



Wenli Wang
PARTNER IN CHARGE
San Francisco, CA



Carisa Wisniewski
PARTNER IN CHARGE
San Diego, CA



Jen Wyne
EXECUTIVE DIRECTOR OF HUMAN RESOURCES
National Office

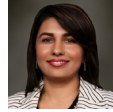
"My personal success relies on the support of many people, men and women. One of the reasons Forum W has been so impactful is the men who leaned in and embraced not just the business case but the high-performing women in the firm, providing sponsorship, mentorship, and leadership opportunities. A rising tide floats more boats and it is up to the women to now pay it forward and work with our other Business Resource Groups to bring equity and inclusion to the leadership ranks."

- Dena Herbolich, Partner

FORUM W LEADERSHIP AWARDS

We've been successful at embedding Forum W into our culture thanks to the hard work and dedication of many people throughout the firm. Here are three who have gone above and beyond this past year.

OFFICE CHAMPION OF THE YEAR

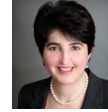


Sintia Younan
SENIOR

California Central Valley

Sintia is the Forum W co-champion of our Stockton office. As a role model who leads through example, she goes out of her way to mentor staff, seniors, and other team members as they navigate their careers.

FORUM W LEADERSHIP-PARTNER



Bertha Minnihan
PARTNER

San Francisco

Bertha is a passionate mentor who helps women articulate what it means for them to effectively work through competing priorities to find balance. She has been a member of our Forum W Advisory Board for four years; has been recognized as an influential woman by the *San Francisco Business Times* and *Silicon Valley Business Journal*; and received a CalCPA Women to Watch Award.

FORUM W LEADERSHIP-EMPLOYEE



Alicia Saka
BUSINESS OPERATIONS MANAGER

Wealth Advisors

Alicia is a member of the firm's National Office Forum W Steering Committee and recently launched a peer networking initiative for client service support professionals within the firm's national office. She's an active member of the Women's Funding Alliance and has spoken externally on reverse mentoring.



RECOGNITION

We're honored to be recognized for our commitment to women and our broader diversity and inclusion efforts.



100 BEST ADOPTION-FRIENDLY WORKPLACES
Dave Thomas Foundation
for Adoption



100 BEST COMPANIES
Working Mother magazine



BEST ACCOUNTING FIRMS FOR DIVERSITY
Vault Accounting 50 (ranked No. 8)



BEST ACCOUNTING FIRMS FOR WOMEN
Accounting MOVE Project



AMERICA'S BEST EMPLOYERS FOR WOMEN
Forbes



TOP COMPANIES FOR EXECUTIVE WOMEN
National Association for
Female Executives



INCLUSION INDEX COMPANY
Diversity Best Practices

FORUM W ADVISORY BOARD

For the last 10 years, our Forum W Advisory Board demonstrated their commitment to making Moss Adams a best place to work for our women. We thank them for their leadership and guidance over the years.

CURRENT MEMBERS

Dan Cheyney

PARTNER

Everett, WA

Alison Dunnebecke

PARTNER

Denver, CO

Dave Follett

**PRESIDENT & CHIEF
OPERATING OFFICER**

National Office

Star Fischer

PARTNER

Everett, WA

Shannan Gardner

PARTNER

Orange County, CA

Bertha Minnihan

PARTNER

San Francisco, CA

Jennifer Price

PARTNER

Portland, OR

Karina Stadelman

PARTNER

Seattle, WA

Lisa Todd

PARTNER

Albuquerque, NM

Francine Vorhees

PARTNER

Rancho Cordova, CA

PAST MEMBERS

Valerie Allen

PARTNER

Albuquerque, NM

Amy Apiado

PARTNER

Portland, OR

Cheri Burnham

PARTNER

Spokane, WA

Denese Cahill

PARTNER

Stockton, CA

Mary Case

PARTNER

Walnut Creek, CA

Brian Conner

PARTNER

Stockton, CA

Jeff Dieleman

PARTNER

Yakima, WA

Randy Fenich

PARTNER

Yakima, WA

Marke Greene

PARTNER

Seattle, WA

Noni LaLone

PARTNER

Everett, WA

Ty Pforsich

PARTNER

Santa Rosa, CA

Rebecca Pomeroy

CHIEF PRACTICE OFFICER

National Office

Stacy Stelzriede

PARTNER

Orange County, CA

Laurie Tish

PARTNER

Seattle, WA

Wenli Wang

PARTNER

San Francisco, CA

Russ Wilson

PARTNER

Bellingham, WA

RESOURCES

VISIT [MOSSADAMS.COM/FORUMFORWOMEN](https://www.mossadams.com/forumforwomen) FOR RESOURCES.



ANNUAL REPORTS



PATH TO SUCCESS

Our series that addresses Forum W's priorities of mentoring, networking, and community service.



LINK BY LINK

A GUIDE TO FORMING A WOMEN'S NETWORK AT YOUR ORGANIZATION

An easy-to-use resource that can help your organization develop strategies to jump-start creating more opportunities for women to advance their careers. We've learned a lot since launching Forum W, and we're excited to share our experiences.





About Moss Adams

With more than 2,900 professionals across 25-plus locations in the West and beyond, Moss Adams provides the world's most innovative companies with specialized accounting, consulting, and wealth management services to help them embrace emerging opportunity. Discover how Moss Adams is bringing more West to business.

Assurance, tax, and consulting offered through Moss Adams LLP. Investment advisory services offered through Moss Adams Wealth Advisors LLC. Investment banking offered through Moss Adams Capital LLC.