Where Women Thrive

Forum W remains a top priority for Moss Adams. It’s part of how we deliver the Moss Adams Advantage to our people—by fostering a diverse and inclusive culture that values women, their voices, and their ideas. It’s become a forum for developing professional relationships, engaging in open dialogue about experiences with the firm, developing careers, and increasing access to role models and mentors. We need to continue to encourage women to engage in their careers and build an environment where women thrive.

We believe Forum W benefits not only our firm but also the clients we serve. As women continue to advance into leadership positions, we find our client base becoming more and more diverse. Embracing that same diversity within the firm helps us align with our clients’ values.

Since we began our efforts in 2008, we’ve made great progress—and we remain open to learning where additional opportunities lie. As we move through our own journey as a firm, we’ve made a commitment to share what we’ve learned to help advance women across our profession as well.
What We Do & How We Do It

OUR MISSION

To accelerate the firm’s success in attracting, developing, retaining, and advancing talented women.

OUR PRIORITIES

Dialogue
Listening to women regarding their career goals and experiences at Moss Adams

Networking
Building and leveraging relationships to benefit individual and firm growth

Mentoring
Connecting those who are developing with those who have already achieved

Advancement
Providing ample growth opportunities and encouraging the pursuit of leadership roles

OUR GOAL

Engage women in their career

Foster a supportive and inclusive work environment

Embed Forum W in our culture
How We Stack Up

What gets measured improves. Women represent about half our firm. Since 2009 we’ve experienced a 5 percent increase in the number of women partners, now at 25 percent—6 percent above the industry average. The numbers of women in leadership roles continue to grow, and women have great things to say about Moss Adams in return.

The Stats

**Keeping Count**

**Turnover Among WomenSeniors Since 2012**
- 31% (30%)
- 21%

**Number of Women in Leadership Roles Since 2009**
- 12% (10%)
- 18%

**Of Experienced Hires Are Women**
- 52%

7 Offices & Groups that have already met our firm-wide goal: for 30% of our partners to be women

Data as of December 31, 2013
What Women at the Firm Say

“I’m proud to say I work for Moss Adams.”

“This is a great place to work.”

“I have the flexibility to manage responsibilities at work and outside of work.”

“This is a great place to build my career.”

90% 83% 77%
Using Dialogue to Light the Way

Three to six years into their accounting careers, many women start to experience FUTURE TRIPPING:

These concerns often prompt premature professional decisions, stalling promising careers and letting talented women slip from our pipeline.

In focus groups on future tripping, women told us they wanted:

- Better insight on what to expect at each level of their career
- More exposure to women role models at the firm
- “Will I be able to balance a family and working at the firm?”
- “I don’t know how to sell. Should I quit now?”
- “Since there aren’t as many women partners as men, what are the odds I’ll become one?”

Engaging in open dialogue is critical to career success. We developed two six-hour workshops to make this happen.
Getting Real Workshop Series

GETTING REAL
Straight Talk on Building Your Career and Investing in Your Future

FINDING WHAT WORKS
Future Tripping, the Morale Curve, and Work-Life Integration

What the Series Covers
- Career development strategies
- Work-life integration
- Taking risks and stretch assignments
- The value of a mentor
- Demonstrating leadership
- Professional networking

Both workshops are facilitated by female partners who share their experiences, provide insight, and demonstrate many different models of success.

The Impact

150 ATTENDEES
95% SAID THEY SAW THE VALUE IN ATTENDING THE WORKSHOP

“Being in the same room as so many inspirational women motivated me to focus on my goals and taught me that I have the power to propel myself forward. It let me focus on work-life integration in a safe place, surrounded by women who will advocate and provide guidance for my career.”

—Kristin Henderson, Senior, Orange County
Giving back to the communities in which we live and work is at the core of Forum W. InspireHer is one of many successful programs spreading across the firm.

Launched in 2014 by the Boys & Girls Clubs of Snohomish County, Washington—where our Everett office spearheaded the firm’s involvement—InspireHer focuses on mentoring and activities for young women ages eight to 18. The program derives its mission (and its tagline) from the documentary Miss Representation: “You can’t be what you can’t see.”

“I’m the first person in my family to go to college or have a career. I didn’t have mentors within my family, so I found them elsewhere. A lot of people helped me along the way, and that’s why I want to give back: to do for others what so many did for me.”

—Noni LaLone, Partner, Everett

**PROGRAM GOALS**

- Connect girls with successful women role models
- Develop strong bodies and minds
- Foster leadership and community involvement
- Provide access to career and academic resources

Women from Moss Adams act as InspireHer mentors, serving their communities while expanding their professional networks.

**RECENT AND UPCOMING EVENTS**

Other women at Moss Adams, inspired by the program, have followed suit. Since launching its own partnership in July 2014, the Albuquerque office has coordinated:

- An etiquette lunch at a local restaurant
- A running club to train for the Duke City Marathon
- A weekly mentoring and tutoring session
- A career day with community leaders
Leading by Example

Forum W is making an impact across the firm. Here's one region that's taking our efforts to new heights.

**SOUTHERN CALIFORNIA**

- Los Angeles: 40% of partners are women
- San Diego: Carisa Wisniewski, the office's partner in charge
- Orange County: 100% retention among women seniors in 2013

**CORPORATE ADVOCATE FOR WOMEN AWARD**

From the Los Angeles Business Journal's Women Making a Difference Awards
Creating Connections

ORANGE COUNTY: FRIENDS IN HIGH PLACES
Growing an internal network is an important part of career development at the Orange County office, which has developed its own Networking Passport Program for new hires.

How the Program Works
New staff schedule coffee or lunch with six people—including senior managers and partners—within three months of starting, earning a passport stamp each time. In the process, they:

- Learn about the firm’s culture and our business
- Gain access to potential mentors

LOS ANGELES: BRANCHING OUT
For the past year, the Los Angeles office has been cultivating a relationship with women at the law firm Foley & Lardner LLP—creating a forum where women from both firms can meet and begin establishing a meaningful and long-lasting network.

women met at the Pink Taco in Century City for an evening of paired networking
SEPTEMBER 2013

women, including clients and prospects of both firms, networked at the City Club in downtown L.A.
MAY 2014
We think the women we hire are talented and accomplished. We’re pleased to say that our profession and our communities think so too. Here are a few who are making a difference.

**Firm Leaders**

**DARCI BOYLE**
National Practice Leader, Medical Groups & Physicians

**MARY CASE**
National Practice Leader, Higher Education

**JULIE DESIMONE**
National Practice Leader, Utilities

**ELAINE ERVIN**
Group Leader, Construction, Real Estate & Professional Services
National Practice Leader, Construction
Executive Committee Member

**MELISSA HARMAN**
National Practice Leader, Not-for-Profit

**BARBARA MEAD**
National Practice Leader, Transportation & Logistics

**BERTHA MINNIHAN**
National Practice Leader, Employee Benefit Plans

**REBECCA POMERING**
CEO, Moss Adams Wealth Advisors
Executive Committee Member

**AMY RUNGE**
National Practice Leader, Long-Term Care

**LAURIE TISH**
Group Leader, Government, Not-for-Profit & Regulated Entities
National Practice Leader, Government

**WENLI WANG**
Partner in Charge, San Francisco

**CARISA WISNIEWSKI**
Partner in Charge, San Diego
LEADING THE WAY

Profession & Community Leaders

STACY STELZRIEDE, PARTNER
2014 Woman CPA of the Year, American Woman’s Society of CPAs

LAURIE TISH, PARTNER
Director-at-Large, National Association of State Boards of Accountancy
2014 Women Worth Watching Award, Profiles in Diversity Journal

KELLY BOSCH, SENIOR MANAGER
2013 20under40 Rising Business Stars Award, blue chip

MARY CASE, PARTNER
Member, WACUBO Industry Alliance Council

STACY STELZRIEDE, PARTNER
2014 Woman CPA of the Year, American Woman’s Society of CPAs

LAURIE TISH, PARTNER
Director-at-Large, National Association of State Boards of Accountancy
2014 Women Worth Watching Award, Profiles in Diversity Journal

KELLY BOSCH, SENIOR MANAGER
2013 20under40 Rising Business Stars Award, blue chip

MARY CASE, PARTNER
Member, WACUBO Industry Alliance Council

ERICA FORHAN, PARTNER
Executive Committee Member, AICPA Government Audit Quality Center

MARY CASE, PARTNER
Member, WACUBO Industry Alliance Council

SHANNAN GARDNER, PARTNER
2014 Women to Watch Award: Experienced Leader, CalCPA

SARA HARPER, SENIOR MANAGER
8th Annual Forty Under 40 Awards, North Bay Business Journal

NONI LALONE, PARTNER
InspireHer Steering Committee Chair, Boys & Girls Clubs of Snohomish County

MINDY MCLEES, DIRECTOR
2014 Taxation Instructor of the Year; Property Tax, Institute for Professionals in Taxation

SARA HARPER, SENIOR MANAGER
8th Annual Forty Under 40 Awards, North Bay Business Journal

TASHA REPP, PARTNER
NAFOA Representative to the GASB’s Governmental Accounting Standards Advisory Council

BERtha MInNIHAN, PARTNER
2014 Most Influential Women in Bay Area Business, San Francisco Business Times

LISA TODD, PARTNER
AICPA Women to Watch Award: Emerging Leader
19th Annual AICPA and NMSCPA Pride in the Profession Awards

TIFFANY PHILLIPS, STAFF
2013 AICPA Elijah Watt Sells Award

Julie DeSIMONE, PARTNER
2014 40 Under 40 Awards, Portland Business Journal

SARa HARpER, SENIor mANAGER
8th Annual Forty Under 40 Awards, North Bay Business Journal

LISA TODD, PARTNER
AICPA Women to Watch Award: Emerging Leader
19th Annual AICPA and NMSCPA Pride in the Profession Awards
Our efforts have been successful thanks to the hard work and dedication of many people throughout the firm. This past year the following three individuals have gone above and beyond:

**FORUM W LEADERSHIP AWARD**

**DENA HERBOLICH**
Partner  
Seattle

**JOHN WHITFIELD**
Business Development Executive  
California Central Valley

**FORUM W OFFICE CHAMPION OF THE YEAR**

**JESSICA CLUZEAU**
Partner  
Los Angeles
This national study aims to provide insight on women in the accounting profession. We’re a founding member.
Forum W Resources

Visit [www.mossadams.com/ForumforWomen](http://www.mossadams.com/ForumforWomen) to learn more about Forum W’s programs and impact. You’ll also find our previous annual reports and the publications in our Path to Success series, which addresses three Forum W priorities critical to the development and advancement of women: mentoring, networking, and community service.

If you’re interested in launching your own women’s network, our easy-to-use resource [Link by Link: A Guide to Forming a Women’s Network at Your Organization](http://www.mossadams.com/LinkbyLink) can help you get started. We’ve learned a lot since we launched Forum W, and we’re excited to share our strategy and experiences in ways that help other organizations jump-start programs to create opportunities for women.
About Moss Adams

Nationwide, Moss Adams and its affiliates provide insight and expertise integral to your success.

Moss Adams LLP is a national leader in assurance, tax, consulting, risk management, transaction, and wealth services.
WWW.MOSSADAMS.COM

Moss Adams Wealth Advisors LLC provides investment management, personal financial planning, and insurance strategies to help you build and preserve your wealth.
WWW.MOSSADAMSWEALTHADVISORS.COM

Moss Adams Capital LLC offers strategic advisory and investment banking services, helping you create greater value in your business.
WWW.MOSSADAMSCAPITAL.COM