OUR COMMITMENT CONTINUES

Our journey to change the face of Moss Adams and our industry started eight years ago. Forum W’s mission of attracting, developing, retaining, and advancing women simply makes good business sense.

We’ve achieved great success over the years. Throughout our journey, the firm has demonstrated unwavering support for Forum W. Forum W has become ingrained in our culture: Women are engaging in honest dialogue about their career, the number of women partners in the firm is higher than industry average, and women are increasingly taking seats at the table as leaders within the firm.

In 2016 we continued our work on women’s development and advancement. We’re developing a strategy to be more proactive in our efforts to increase the representation of women in significant leadership roles and at the partner level. This means being more deliberate about who’s considered for leadership roles, establishing goals, and instilling accountability. We also launched the GroWth series, a leadership development program to inspire women to become partners in the firm, and help them strengthen their leadership skills to get them there.

We invite you to learn more about the importance of building women leaders in our 2016 Forum W annual report. Although we have a lot to be proud of, we’re also inspired by what we can continue to accomplish.

CHRIS SCHMIDT
Chairman and CEO

DAVE FOLLETT
President and COO

JEN WYNE
Director of Human Resources
SETTING A COURSE

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

Priorities:
• Encourage women to take ownership of their career, and create practical ways partners can engage in women’s development and advancement.
• Create a more intentional process to identify candidates and fill leadership roles.
• Refresh and reinforce the business case for Forum W.
• Use external events and recognition to expand Forum W’s impact in the marketplace.

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.
NOTABLE NUMBERS

By the Numbers

Reaching a 30 percent woman partnership is our goal by 2022. We’re well on our way: Our women currently make up 26 percent of our partners. Across the industry, the average percentage of women partners stands at 23 percent. We’re holding strong, championing our women, and as a result, our women are hitting our goals and growing our firm.

Source: Industry-wide data from the 2015 and 2016 Accounting MOVE Project Reports.
Employee Engagement Statistics

- **94%** of women employees say they’re proud to work for Moss Adams.
- **86%** of women would gladly refer a good friend or family member to Moss Adams for employment.
- **89%** of women employees say Moss Adams is a great place to work.
- **88%** of women employees are satisfied with the firm’s commitment to social responsibility.

Locations with 30% Women Partners

- **50%** Tacoma
- **45%** Spokane
- **43%** Albuquerque
- **40%** Medford
- **38%** San Francisco
- **33%** Bellingham and Los Angeles
- **31%** Seattle
- **30%** Portland

“I’m so proud to say that sponsorship is a significant focus for our partners and a formal initiative of Forum W. Sponsorship accounted for a significant part of my growth into leadership positions, and impacted my personal career path to partner within the firm.”

–Lisa Todd, Partner
2016 Happenings

Firmwide Highlights

These programs demonstrate how we, as a firm, are putting more focus on how we’re advancing women and increasing the number of women partners and women in leadership roles.

GroWth Series

Launched in January 2016, the GroWth series is designed to strengthen our pipeline of women partners. This is a year-long leadership development program that consists of three 1.5-day sessions, each with an area of focus: Build Your Brand, Build Your Team, and Build Your Business. The target is high-potential, two-to-four-year senior managers; we had 16 high-potential senior manager women participate. The result: The women appreciated the firm’s investment in helping them succeed and felt a sense of pride in participating in this year-long program.

PROGRAM OBJECTIVES:

- Inspire and motivate women to become a partner in the firm
- Clarify line of sight to partner
- Supplement technical skills with business acumen and leadership skills
- Develop camaraderie and a network with other women across the firm
- Address unique leadership development issues facing women

"The Forum W GroWth Series has had a tremendous impact on my career at Moss Adams. I’m so grateful for the topics that focused on how we, as women, can build our brand, our people, and our business. I feel energized and excited for my future at Moss Adams!"

—Shannon Avrett, Senior Manager
Succession Planning Playbook

This playbook consists of 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 recommends strategies to think critically about how individuals are identified and selected for leadership and development opportunities. Changing behavior will result in change in our culture. Being mindful of our process and instilling accountability will result in an increase of women partners and women in leadership roles.

THE LEADERSHIP OPPORTUNITY DECISION FRAMEWORK

This series of questions and considerations helps us to expand the candidate pool, identify and select successors, vet candidates, and appoint leadership roles. Through this tool, we can establish a diverse slate of candidates by thinking critically about the way individuals are identified and selected for leadership opportunities. It can be applicable to all types and levels of leadership roles, whether firmwide, regional, or at a certain location.

Accounting MOVE Project

Since the beginning of Forum W, we’ve said it’s our responsibility to give back to our profession. As a founding sponsor of MOVE project, we’re helping to uncover strategies specific to our profession on how to develop and advance women in public accounting. This national study provides insight on women in public accounting by measuring four factors essential to women’s advancement:

- Money
- Opportunities
- Vital work-life resources
- Entrepreneurship
Regional and Office Highlights

At the local level, office champions and steering committees help Forum W make an impactful on the women in their office, creating a path for the firm’s future women leaders. Here are some event highlights from our regions and offices.

<table>
<thead>
<tr>
<th>REGION</th>
<th>EVENT NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern California</td>
<td>MORE: Making Our Relationships Exceptional</td>
<td>The MORE Mentoring Program is designed to bolster the initiatives set by Forum W—to attract, develop, retain, and advance our talented women. As the firm continues to grow, mentoring relationships will have a lasting impact on our abilities to sustain our deep-rooted culture and deliver the Moss Adams Advantage for our people. The Southern California and Phoenix region implemented MORE in the summer of 2016, during which the concept of sponsorship was developed and ideas were shared on how to develop careers and impact the future of our people.</td>
</tr>
<tr>
<td>Greater Bay Area</td>
<td>Forum W: Why Is it Important to EVERYONE?</td>
<td>This event introduced the importance of Forum W to our San Francisco office for both our male and female partners. The success and impact of the initiative hinges on everyone’s involvement and contribution. Included was a brainstorming session on how each participant can contribute—and make Forum W more impactful—based on function, level, or even individually.</td>
</tr>
<tr>
<td>Oregon</td>
<td>Connection Network</td>
<td>This event aimed to increase mentorship between management and staff while encouraging and building networking skills by making both sides accountable.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Client Service Support (CSS), staff, and seniors</strong> are to invite a manager, senior manager, or partner to join them at three networking events. After each event, whether a networking or client meeting, they’re to send a brief summary of the event to Michelle Meador.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Managers, senior managers, and partners</strong> are to invite a CSS, staff, or senior to attend two client meetings, calls, or presentations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Management and staff attend Forum W networking, client communication, and additional trainings between June and November.</td>
</tr>
<tr>
<td>California Central Valley</td>
<td>Passport Program</td>
<td>This program provides new hires and interns the opportunity to build and expand their internal network—particularly with senior managers and partners—they can apply the same skill in building their external network. The program increases their confidence to connect and build relationships with people they wouldn’t normally interact with. Participants indicated they’ve received projects directly from those senior managers and partners they had lunch or coffee with, and the insight or advice received from each person is invaluable.</td>
</tr>
</tbody>
</table>
GETTING NOTICED

We’re honored that organizations outside of Moss Adams recognize our commitment to develop and advance women.

100 BEST ADOPTION-FRIENDLY WORKPLACES
Dave Thomas Foundation for Adoption

BEST ACCOUNTING FIRMS FOR WOMEN
Accounting MOVE Project

TOP COMPANIES FOR EXECUTIVE WOMEN
National Association for Female Executives

100 BEST COMPANIES
Working Mother magazine
## Firm Leaders

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

<table>
<thead>
<tr>
<th>Firm Leaders</th>
<th>Position</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>DARCI BOYLE</td>
<td>National Practice Leader</td>
<td>Portland, OR</td>
</tr>
<tr>
<td>DENA HERBOLICH</td>
<td>National Practice Leader</td>
<td>Seattle, WA</td>
</tr>
<tr>
<td>AMY RUNGE</td>
<td>National Practice Leader</td>
<td>San Francisco, CA</td>
</tr>
<tr>
<td>MARY CASE</td>
<td>National Practice Leader</td>
<td>Higher Education Practice</td>
</tr>
<tr>
<td>JUSTINE HUNTER</td>
<td>National Practice Leader</td>
<td>Restaurants Practice</td>
</tr>
<tr>
<td>LAURIE TISH</td>
<td>National Practice Leader</td>
<td>Government Practice</td>
</tr>
<tr>
<td>ERICA COOGAN</td>
<td>Partner in Charge</td>
<td>Moss Adams Wealth Advisors</td>
</tr>
<tr>
<td>BARBARA MEAD</td>
<td>National Practice Leader</td>
<td>Transportation &amp; Logistics Practice</td>
</tr>
<tr>
<td>PIPER TURNER</td>
<td>Director of Marketing</td>
<td>National Office</td>
</tr>
<tr>
<td>JULIE DESIMONE</td>
<td>National Practice Leader</td>
<td>Energy &amp; Utilities Practice</td>
</tr>
<tr>
<td>BERTHA MINNIHAN</td>
<td>National Practice Leader</td>
<td>Employee Benefit Plan Services</td>
</tr>
<tr>
<td>WENLI WANG</td>
<td>Partner in Charge</td>
<td>San Francisco, CA</td>
</tr>
<tr>
<td>ELAINE ERVIN</td>
<td>National Practice Leader</td>
<td>Construction Practice</td>
</tr>
<tr>
<td>REBECCA POMERING</td>
<td>Chief Practice Officer</td>
<td>National Office</td>
</tr>
<tr>
<td>CARISA WISNIEWSKI</td>
<td>Partner in Charge</td>
<td>San Diego, CA</td>
</tr>
<tr>
<td>MELISSA HARMAN</td>
<td>National Practice Leader</td>
<td>Not-for-Profit Practice</td>
</tr>
<tr>
<td>RHONDA POWELL</td>
<td>Director of Tax</td>
<td>National Office</td>
</tr>
<tr>
<td>JEN WYNE</td>
<td>Director of Human Resources</td>
<td>National Office</td>
</tr>
</tbody>
</table>
## Recognizing Women Leaders

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nada Barrett</td>
<td>Director</td>
<td>California Central Valley</td>
</tr>
<tr>
<td>Heather Schlenker</td>
<td>Senior Manager</td>
<td>California Central Valley</td>
</tr>
<tr>
<td>Maria Braun</td>
<td>Supervisor</td>
<td>Greater Bay Area</td>
</tr>
<tr>
<td>Tracy Paglia</td>
<td>Partner</td>
<td>California Central Valley</td>
</tr>
<tr>
<td>Gena St. George</td>
<td>Senior Manager</td>
<td>Puget Sound Region</td>
</tr>
<tr>
<td>Erica Forhan</td>
<td>Partner</td>
<td>National Office</td>
</tr>
<tr>
<td>Rae Paulson</td>
<td>Senior Manager</td>
<td>Greater Bay Area</td>
</tr>
<tr>
<td>Lisa Todd</td>
<td>Partner</td>
<td>Central Region</td>
</tr>
<tr>
<td>Rhonda Powell</td>
<td>Partner</td>
<td>National Office</td>
</tr>
<tr>
<td>Wenli Wang</td>
<td>Partner</td>
<td>Greater Bay Area</td>
</tr>
<tr>
<td>Barbara Mead</td>
<td>Partner</td>
<td>Puget Sound Region</td>
</tr>
<tr>
<td>Tiffany Phillips</td>
<td>Senior</td>
<td>Oregon</td>
</tr>
<tr>
<td>Rebecca Pomeroy</td>
<td>Chief Practice Officer</td>
<td>National Office</td>
</tr>
<tr>
<td>Jackie Merrill</td>
<td>Senior Manager</td>
<td>Oregon</td>
</tr>
<tr>
<td>Roma Powell</td>
<td>Partner</td>
<td>National Office</td>
</tr>
<tr>
<td>Hiromi Young</td>
<td>Senior Manager</td>
<td>Greater Bay Area</td>
</tr>
</tbody>
</table>
LEADERSHIP AWARDS

Leadership Award, Employee

KRISTINE HOEFLIN
TAX SENIOR MANAGER, EVERETT
Kristine is an extremely impactful leader and supporter of Forum W. Her career-long commitment to the mission and vision of Forum W has been evident during her past four years as the Everett Office Champion. Kristine plans and coordinates numerous successful Forum W events throughout the year, and directly helps other women through mentorship and sponsorship.

Leadership Award, Partner

TONY O’DONNELL
ASSURANCE PARTNER, CALIFORNIA CENTRAL VALLEY
Tony has embraced and infused the mission of Forum W into his leadership style through the decisions he makes and the actions he takes. Tony is mindful about providing opportunities to the women in the California Central Valley and strives to be inclusive and supportive. He wants to build a firm where women feel valued and mentored and have the support to tackle challenges and advance within the profession.

Office Champion of the Year

WENDY TODD
TAX SENIOR MANAGER, ORANGE COUNTY
Wendy has worked diligently to expand her role as office champion to assist other offices in Southern California and Phoenix as well as locations outside of her region. Her belief in the importance of mentoring our women has helped to reinvigorate the Orange County mentoring program. She’s helped create and facilitate programs across offices, and has used her position to create additional leadership opportunities for women through the creation of new subcommittees.
FORUM W RESOURCES

Visit [WWW.MOSSADAMS.COM/FORUMFORWOMEN](http://WWW.MOSSADAMS.COM/FORUMFORWOMEN) to find resources including:

- Our previous annual reports
- Our Path to Success series, which 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
  > Link by Link is an easy-to-use resource that can help you get started. We’ve learned a lot since launching Forum W, and we’re excited to share our strategy and experiences to help other organizations get a jump-start on creating more opportunities for women to advance their careers.

**FORUM W ADVISORY BOARD**

Dan Cheyney  
Jeff Dieleman  
Dave Follett  
Shannan Gardner  
Marke Greene  
Bertha Minnihan  
Jennifer Price  
Lisa Todd  
Francine Vorhees

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