With an abiding sense of responsibility for our clients, our colleagues, and the future, we’re committed to delivering the highest level of professional integrity. That’s why having women represented in leadership is important for driving our success at Moss Adams. It’s also why our commitment to Forum W—the firm’s effort to attract, retain, develop, and advance talented women—is unwavering.

We strive to be one of the best places for women to work and are proud of our achievements since launching Forum W in 2008. It’s helped us foster a more inclusive culture, recruit talented women, and create more growth and development opportunities for them within the firm.

In 2017, we focused on growth and advancement programs such as our GroWth Series and the Succession Planning Playbook, which inspire women to become leaders and help them strengthen their skills to get them there. Because of these efforts and the impressive achievements of the women who work here, we’re proud to say that Moss Adams continues to have a higher number of women partners than the industry average.

We invite you to learn more in our 2017 Forum W annual report, which explores our unyielding commitment to creating a better future with strong, diverse leadership.
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
Reaching a partnership made up of 30% women is our goal by 2022. We’re well on our way: Our women currently make up 26% of our partners. Across the industry, the average percentage of women partners stands at 24%.

**LOCATIONS WITH AT LEAST 30% WOMEN PARTNERS**

- **PORTLAND**: 32%
- **ALBUQUERQUE**: 33%
- **BELLEFONTAIN**: 35%
- **LOS ANGELES**: 39%
- **SAN FRANCISCO**: 40%
- **MEDFORD**: 43%
- **SEATTLE**: 50%
- **TACOMA**: 50%


**WOMEN AT MOSS ADAMS & ACROSS THE INDUSTRY**

- **STAFF**: 53%*
- **SENIOR**: 49%*
- **MANAGER**: 50%*
- **SENIOR MANAGER**: 47%*
- **DIRECTOR**: 35%*
- **PARTNER**: 26%*

EMPLOYEE ENGAGEMENT

92% of women say they’re proud to work for Moss Adams

8% INCREASE since 2009

86% of women would gladly refer a good friend or family member to Moss Adams for employment

13% INCREASE since 2009

90% of women say Moss Adams is a great place to work

8% INCREASE since 2009

80% of women consider Moss Adams a great place to build their careers

11% INCREASE since 2009
GroWth Series
Now in its second 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 network, and strengthen leadership skills to be successful.

Getting Real: 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 who are three to six years into their careers are invited to attend. Since this concept launched five years ago, it’s expanded to a three-part series from a one-part series and has become a high-impact venue where women can engage in dialogue about their experience with the firm.

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. Going forward, we’ll follow these strategies across the firm because we believe changing behavior results in a change in our culture.

Accounting MOVE Project
As a founding sponsor of MOVE Project, 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.
Regional Highlights

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

Professional Style
OFFICE PRESENTATIONS AND ONE-ON-ONE CONSULTATIONS

Professional style consultants visited four Washington State offices to discuss how achieving personal and professional style creates our personal brand and allows us to be both authentic and confident. The consultants used the Moss Adams dress code policy to build their presentation and filtered that information to our people in the form of practical advice. Following each office’s presentation, our people had the opportunity to sign up for a 30-minute one-on-one style consultation.

Winspire
FRESNO

Our Fresno location hosted its first annual Winspire event in May. More than 70 local business women attended the event, which aims to build a network of local business, community, and public service leaders. Ashley Swearengin, former mayor of Fresno, was the keynote speaker.

Gender Equality Challenge Forum
SAN FRANCISCO

In January, the San Francisco Department on the Status of Women, Bay Area Council, and Friends of the Commission on the Status of Women recognized 10 companies, including Moss Adams, for model or emerging best practices in the gender equality space. Jen Wyne, executive director of human resources at Moss Adams, gave a presentation about Forum W before leading a roundtable discussion about gender equality in the workplace. For more information, visit genderprinciples.org.

Women’s Leadership Forum
WESTERN ASSOCIATION OF COLLEGE & UNIVERSITY BUSINESS OFFICERS (WACUBO)

Melissa Harman, partner and leader of the Not-for-Profit Practice at Moss Adams, delivered the keynote address at the inaugural WACUBO Women’s Leadership Forum in Scottsdale, Arizona. Melissa’s keynote address, “The Diversity-Engagement Equation: Helping Women Thrive,” focused on Forum W’s success and how similar women’s networks can help businesses connect engagement and diversity.

Women’s Leadership Forum
CALIFORNIA SOCIETY OF CPAS

Moss Adams was a platinum sponsor of the 2017 California Society of CPAs’ Women’s Leadership Forum in San Francisco, California. Rebecca Pomering, chief practice officer at Moss Adams, and Jana Wright, a senior manager at Moss Adams, led a session called Gamifying Success. During this session, they discussed how to achieve career success in an evolving gaming world by turning activities into something resembling a game with rewards. The topics included positioning yourself for success in a multigenerational workforce; getting a seat at the table; and building a personal brand.
RECOGNITION

We’re honored to be recognized for our commitment to developing and advancing women. This inspires us to work even harder to build a culture where women can thrive.

100 BEST ADOPTION-FRIENDLY WORKPLACES
Dave Thomas Foundation for Adoption

100 BEST COMPANIES
Working Mother magazine

AWARDS OF EXCELLENCE
International Innovation in Diversity Awards, Profiles in Diversity Journal

BEST ACCOUNTING FIRMS FOR WOMEN
Accounting MOVE Project

INNOVATION IN WOMEN’S PROGRAMMING AWARD
American Woman’s Society of Certified Public Accountants

TOP COMPANIES FOR EXECUTIVE WOMEN
National Association for Female Executives
FIRM LEADERS

These women inspire others to realize their full potential—leading by example.

Corinne Baughman  
PARTNER  
Executive Committee  
Orange County, CA

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

Mary Case  
NATIONAL PRACTICE LEADER  
Higher Education Practice  
San Francisco, CA

Erica Coogan  
PARTNER IN CHARGE  
Moss Adams Wealth Advisors

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

Elaine Ervin  
NATIONAL PRACTICE LEADER  
Construction Practice  
Seattle, WA

Melissa Harman  
NATIONAL PRACTICE LEADER  
Not-for-Profit Practice  
Los Angeles, CA

Dena Herbolich  
NATIONAL PRACTICE LEADER  
Professional Services Practice  
Seattle, WA

Justine Hunter  
NATIONAL PRACTICE LEADER  
Restaurants Practice  
Los Angeles, CA

Bertha Minnihan  
NATIONAL PRACTICE LEADER  
Employee Benefit Plan Services  
San Francisco, CA

Rebecca Pomerling  
CHIEF PRACTICE OFFICER  
National office

Rhonda Powell  
DIRECTOR OF TAX  
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  
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  
Human Resources  
National office
AWARDS & INVOLVEMENT

Many women across the firm are making an impact in their profession and in the community. Here are some of the women we look up to.

Position
Award

Manuela Barton
MANAGER | Spokane, WA
❖ Treasurer
Latino Hope Foundation

Sara Bailey
SENIOR MANAGER | Yakima, WA
❖ 2017 New Professional Award
Washington Society of CPAs

Mary Case
PARTNER | San Francisco, CA
❖ Women to Watch—Experienced Leader Award
California Society of CPAs
❖ Board of Directors & Audit Committee Chair
Worldreader
❖ Business Partner Council
Western Association of College and University Business Officers

Camille Christiansen
SENIOR MANAGER | Spokane, WA
❖ Associate Members’ Committee
Alaska Telephone Association

Liz Dollar
PARTNER | San Francisco, CA
❖ Most influential Women in Bay Area Business
San Francisco Business Times
❖ Board of Directors
Raphael House
❖ Board Treasurer
Via Heart Project

Kelli Franco
PARTNER | Spokane, WA
❖ Advisory Board Member
Washington State University Planned Giving
❖ Tax & Legislative Affairs Committee Vice Chair
Construction Financial Management Association

Shannan Gardner
PARTNER | Orange County, CA
❖ Most influential Women in Bay Area Business
San Francisco Business Times

Stephanie Hathaway
PARTNER | Bellingham, WA
❖ Vice President & Continuing Education Director
Society for Trust and Estate Practitioners (STEP) Seattle

Kate Jackson
SENIOR MANAGER | Sacramento, CA
❖ Women to Watch—Emerging Leader Award
California Society of CPAs
❖ Board of Directors and Finance Committee
Ronald MacDonald House Charities Northern California
❖ Finance Committee
Girl Scouts Heart of Central California
## AWARDS & INVOLVEMENT (CONTINUED)

<table>
<thead>
<tr>
<th>Position</th>
<th>Award</th>
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<tbody>
<tr>
<td>Ashley Jacobsen</td>
<td>Senior Manager</td>
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<tr>
<td>Women to Watch—Emerging Leader Award</td>
<td>California Society of CPAs</td>
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<tr>
<td>Working Mother of the Year</td>
<td>Working Mother Magazine</td>
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<tr>
<td>Lead Tabulator</td>
<td>Miss California Scholarship Organization Scholarship Fund</td>
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<tr>
<td>Development Committee Member</td>
<td>Smittcamp Family Honors College, Fresno State</td>
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<tr>
<td>Francine Voorhees</td>
<td>Partner</td>
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<tr>
<td>Don Poole Award</td>
<td>Sacramento Region Community Foundation</td>
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<tr>
<td>Bridge Builder Award</td>
<td>Sacramento Region Community Foundation</td>
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<tr>
<td>Advisory Committee</td>
<td>Philanthropic Advisors' Forum of Greater Sacramento</td>
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<tr>
<td>Board Vice President</td>
<td>Juvenile Diabetes Research Foundation Northern California Inland Chapter</td>
</tr>
<tr>
<td>Noni LaLone</td>
<td>Partner</td>
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<tr>
<td>Ruby Award</td>
<td>Soroptimist International of Everett</td>
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<tr>
<td>Jackie Merrill</td>
<td>Senior Manager</td>
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<tr>
<td>20 Under 40 Award</td>
<td>sponsored by Mercedes-Benz Eugene and Blue Chip magazine</td>
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<tr>
<td>Michelle Van Dellen</td>
<td>Senior Manager</td>
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<tr>
<td>Board Member</td>
<td>Northwest Washington Estate Planning Council</td>
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<tr>
<td>Board Member</td>
<td>Boys &amp; Girls Clubs of Whatcom County</td>
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<tr>
<td>Wenli Wang</td>
<td>Partner</td>
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<tr>
<td>Forever Influential—Influential Women</td>
<td>San Francisco Business Times</td>
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<tr>
<td>Carisa Wisniewski</td>
<td>Partner</td>
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<tr>
<td>500 Most Influential Business Leaders 2016</td>
<td>San Diego Business Journal</td>
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<tr>
<td>Board Member</td>
<td>American Red Cross of San Diego &amp; Imperial Counties</td>
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<tr>
<td>Audit Committee Chair</td>
<td>Girl Scouts of San Diego</td>
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<tr>
<td>Board Member</td>
<td>Tech San Diego</td>
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<tr>
<td>Board Member</td>
<td>LEAD San Diego</td>
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FORUM W LEADERSHIP AWARDS

OFFICE CHAMPION OF THE YEAR

Letizia Brentano
TAX SENIOR MANAGER
Los Angeles

Letizia has been an active member of the Los Angeles Forum W Committee since July 2013 and continues to drive Forum W forward with her ideas and suggestions. She’s also a true champion of mentoring—acting as a mentor to several individuals and working to identify and create unique networking opportunities for women.

FORUM W LEADERSHIP–PARTNER

Francine Vorhees
TAX PARTNER
Sacramento

Francine inspires the firm—including her office and region—to attract, develop, retain, and promote women. She clearly understands and articulates where gender gaps exist and offers solutions that engage her audience and motivates them to take action. She’s also making a lasting impression through her work on the Forum W advisory board, where she helps drive the future and effectiveness of Forum W.

FORUM W LEADERSHIP–EMPLOYEE

Sarah Stevens
HUMAN RESOURCES SENIOR
Everett

Sarah has played a key role in building a Forum W strategy for Washington that has a positive impact on the region. Due to her efforts, the Forum W engagement survey scores for Washington continue to improve every year. She’s also responsible for organizing and leading the Washington region office champion meetings, which create opportunities for office champions to connect and collaborate.
VISIT MOSSADAMS.COM/FORUMFORWOMEN TO FIND MORE 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.

FORUM W ADVISORY BOARD

Dan Cheyney  
PARTNER  
Everett, WA

Bertha Minnihan  
PARTNER  
San Francisco, CA

Jeff Dieleman  
PARTNER  
Yakima, WA

Jennifer Price  
PARTNER  
Portland, OR

Dave Follett  
PRESIDENT & CHIEF OPERATING OFFICER  
Seattle, WA

Lisa Todd  
PARTNER  
Albuquerque, NM

Shannan Gardner  
PARTNER  
Irvine, CA

Francine Vorhees  
PARTNER  
Rancho Cordova, CA

Marke Greene  
PARTNER  
Seattle, WA
About Moss Adams

With more than 2,600 professionals across 20-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.