

2017 ANNUAL REPORT



MOSSADAMS

FORUM **W**

BUSINESS RESOURCE GROUP
DIVERSITY & INCLUSION

PERSONALLY INVESTED

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.

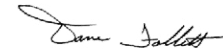
We strive to be one of the best places for women to work and are proud of our achievements since launching Forum W in 2008. It's helped us foster a more inclusive culture, recruit talented women, and create more growth and development opportunities for them within the firm.

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.



Chris Schmidt
CHAIRMAN AND CEO



Dave Follett
PRESIDENT AND COO



Jen Wyne
EXECUTIVE DIRECTOR OF
HUMAN RESOURCES



PERSPECTIVE

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

BY THE NUMBERS

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%.

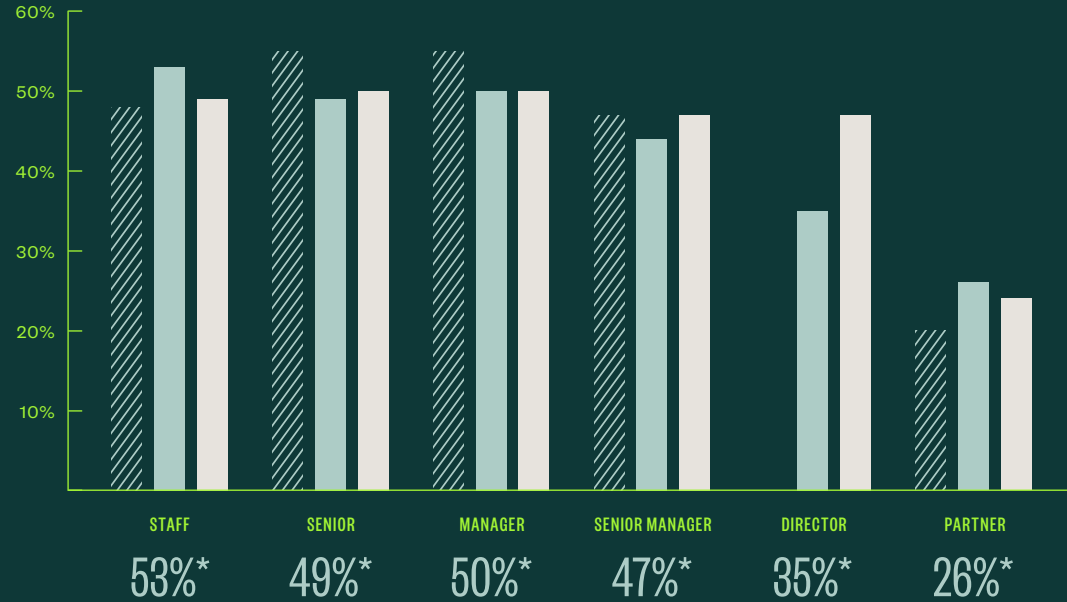
/// MOSS ADAMS 2009 (first Forum W annual report issued)

■ MOSS ADAMS 2017*

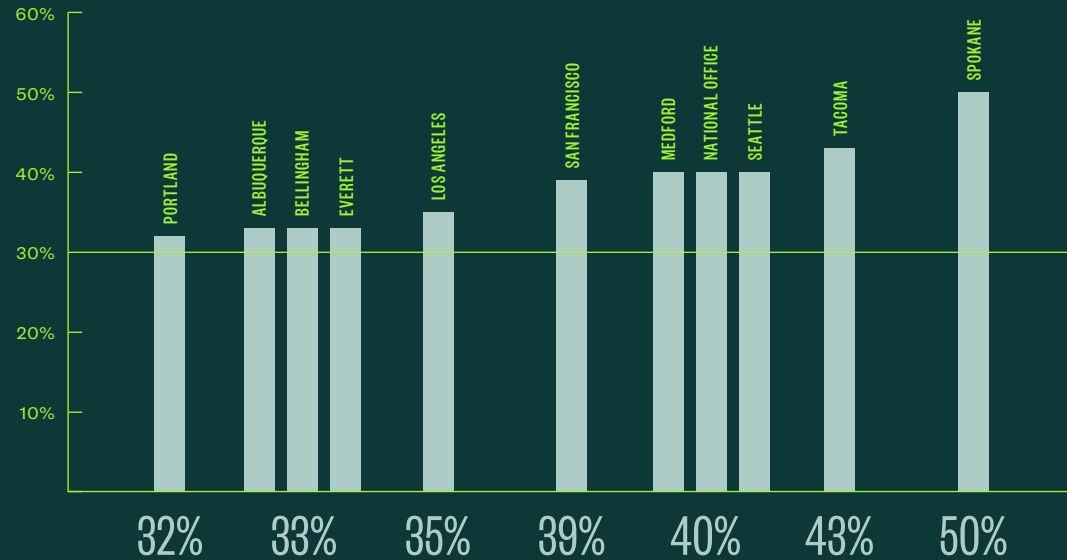
■ INDUSTRYWIDE 2017

Source: Industrywide data from the 2017 Accounting MOVE Project Reports. Moss Adams 2009 data as of July 31, 2009; Moss Adams 2017 data as of July 31, 2017.

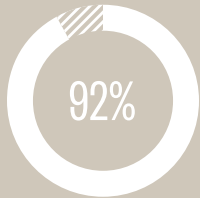
WOMEN AT MOSS ADAMS & ACROSS THE INDUSTRY



LOCATIONS WITH AT LEAST 30% WOMEN PARTNERS



EMPLOYEE ENGAGEMENT



of women say they're proud to work for Moss Adams

8% INCREASE
since 2009



of women say Moss Adams is a great place to work

8% INCREASE
since 2009



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

13% INCREASE
since 2009



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

11% INCREASE
since 2009



FIRMWIDE HIGHLIGHTS

The success of Forum W takes steadfast commitment across the firm at all levels, by men and women. We've implemented these strategies and programs so we can continue to evolve and sustain cultural change—advancing women and increasing the number of women partners and women in leadership roles.

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.

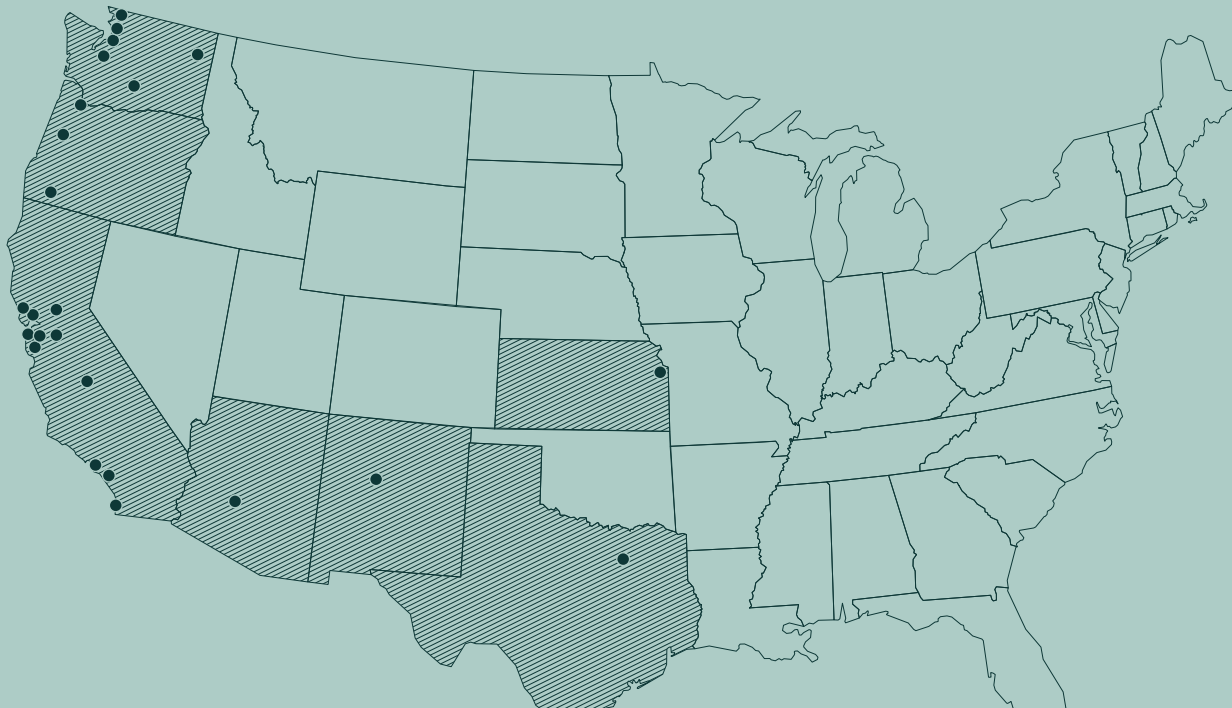
Accounting MOVE Project

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 Pomeroy, 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

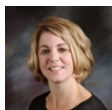
National Association for
Female Executives

FIRM LEADERS

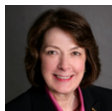
These women inspire others to realize their full potential—leading by example.



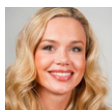
Corinne Baughman
PARTNER
Executive Committee
Orange County, CA



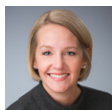
Darci Boyle
NATIONAL PRACTICE LEADER
Medical Groups & Physicians Practice
Portland, OR



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



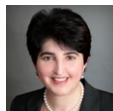
Melissa Harman
NATIONAL PRACTICE LEADER
Not-for-Profit Practice
Los Angeles, CA



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 Pomeroy
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



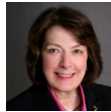
Manuela Barton
MANAGER | *Spokane, WA*

- ❖ **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



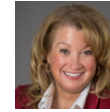
Camille Christiansen
SENIOR MANAGER | *Spokane, WA*

- ❖ **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*

- ★ **Women Worth Watching**
Profiles in Diversity Journal



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)

- ❖ Position
- ★ Award



Ashley Jacobsen

SENIOR MANAGER | *Fresno, CA*

★ **Women to Watch—Emerging Leader Award**
California Society of CPAs

★ **Working Mother of the Year**
Working Mother Magazine

❖ **Lead Tabulator**
Miss California Scholarship
Organization Scholarship Fund

❖ **Development Committee Member**
Smittcamp Family Honors College, Fresno State



Noni LaLone

PARTNER | *Everett, WA*

★ **Ruby Award**
Soroptimist International of Everett



Jackie Merrill

SENIOR MANAGER | *Eugene, OR*

★ **20 Under 40 Award**
sponsored by Mercedes-Benz Eugene
and *Blue Chip* magazine



Lisa Todd

PARTNER | *Albuquerque, NM*

❖ **Board Chair**
New Mexico Society of CPAs



Francine Voorhees

PARTNER | *Sacramento, CA*

★ **Don Poole Award**
Sacramento Region Community Foundation

★ **Bridge Builder Award**
Sacramento Region Community Foundation

❖ **Advisory Committee**
Philanthropic Advisors' Forum
of Greater Sacramento

❖ **Board Vice President**
Juvenile Diabetes Research Foundation
Northern California Inland Chapter



Michelle Van Dellen

SENIOR MANAGER | *Bellingham, WA*

❖ **Board Member**
Northwest Washington Estate Planning Council

❖ **Board Member**
Boys & Girls Clubs of Whatcom County



Wenli Wang

PARTNER | *San Francisco, CA*

★ **Forever Influential—Influential Women**
San Francisco Business Times



Carisa Wisniewski

PARTNER | *San Diego, CA*

★ **500 Most Influential Business Leaders 2016**
San Diego Business Journal

❖ **Board Member**
American Red Cross of San Diego
& Imperial Counties

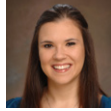
❖ **Audit Committee Chair**
Girl Scouts of San Diego

❖ **Board Member**
Tech San Diego

❖ **Board Member**
LEAD San Diego

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 in part 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.



RESOURCES

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

Jeff Dieleman

PARTNER

Yakima, WA

Dave Follett

PRESIDENT & CHIEF
OPERATING OFFICER

Seattle, WA

Shannan Gardner

PARTNER

Irvine, CA

Marke Greene

PARTNER

Seattle, WA

Bertha Minnihan

PARTNER

San Francisco, CA

Jennifer Price

PARTNER

Portland, OR

Lisa Todd

PARTNER

Albuquerque, NM

Francine Vorhees

PARTNER

Rancho Cordova, CA



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.