

Moss Adams  
**Foundation**

2023 ANNUAL REPORT





## FROM OUR CHAIR & MOSS ADAMS CEO

The Moss Adams Foundation cultivates opportunity in our communities by investing in social equity, education, and the environment. Through community partnerships, grantmaking, and people engagement, the foundation strives to have a lasting, positive impact on our communities and amplify the firm's inclusion and diversity (I&D) strategy.

We understand that people are at the core of every community. That's why we center the foundation's work around people. In 2023, we introduced programming that empowers Moss Adams team members to connect with the communities and causes of which they're passionate.

We supported the firm in implementing eight hours of paid volunteer time off for every Moss Adams team member—leading to more than 3,500 hours of volunteering efforts. We launched GiveBack Grants, where the firm's people used their voices to guide us toward new community partnerships. We doubled down on fostering

a culture of giving back, providing funds for every new hire to donate to an organization of their choice, in addition to the foundation's longstanding donation match.

The foundation's commitment to community and priority funding areas will continue guiding its path forward. I'm excited to see how the foundation evolves as we seek new ways to deepen our impact.

This annual report celebrates the impact the foundation made in 2023, in addition to the people and communities it serves. I'm tremendously proud of the foundation's direction, the participation of Moss Adams team members, and most importantly: the opportunities and impact it delivered to our communities.

A stylized, handwritten signature in dark ink, consisting of a large 'E' followed by a series of loops and a final 'M'.

**Eric Miles**

he/him  
Chair, Moss Adams Foundation  
CEO, Moss Adams



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2023 FOUNDATION TOTAL IMPACT\*

**\$2,278,000**

SOCIAL EQUITY

**745,000**

CHARITABLE GIVING

**\$433,000**

ENVIRONMENT

**\$70,000**

FOUNDATION MATCHING

**\$708,000**

EDUCATION

**\$322,000**

\*Charitable giving totals include donations by Moss Adams team members and locations alongside foundation donations.



NOT-FOR-PROFITS  
SUPPORTED

**1,572**



MOSS ADAMS  
TEAM MEMBER  
VOLUNTEER HOURS

**3,524**

## COMMITMENT TO COMMUNITY

The Moss Adams Foundation works closely with community organizations to fund the future, directing dollars to social equity, environmental, and education initiatives that develop the next generation of leaders.

**The true impact of our work rests in the lives we touch and how we cultivate opportunity in our communities.**

Leveraging an inclusive philanthropy model, we provide innovative thinking and essential resources to organizations focused on systems-level change.

In 2023, the foundation invested \$2,278,000 into communities across the United States. With a focus on cultivating impact, our donations, grantmaking, and matching programs support not-for-profits that create opportunities for the next generation to develop the skills necessary to be successful in a changing professional landscape.

The foundation and Moss Adams partnered to uplift underrepresented communities and create engagement opportunities for our people to devote their time and talent to not-for-profits leading change in the social equity, environment, and education spaces.

Through these initiatives, Moss Adams team members donated \$433,000 to 1,570 not-for-profits. Between the dedication of Moss Adams team members and the foundation's matching and grantmaking programs, \$745,000 went toward funding social equity-related initiatives, with \$70,000 to environment-related causes, and \$322,000 toward universities and education not-for-profits.



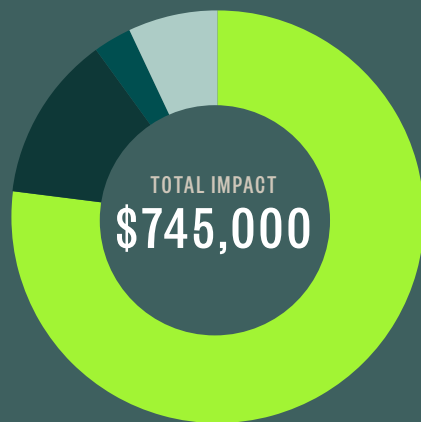
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# Social Equity

Our goal is to be a catalyst for change and opportunity, creating lasting impact on our communities by centering social equity and inclusivity in our giving strategy. This year, we dedicated \$745,000 to causes and initiatives that delivered on this goal at both the community and systems levels.



## SOCIAL EQUITY



**CAQ, Accounting+**  
\$575,000

**PhD Project**  
\$25,000

**GiveBack Grants**  
\$100,000

**Charitable Giving**  
\$45,000

Giving Tuesday funds are reflected in the foundation's overall charitable giving and matching totals, not in this chart.

## CAQ ACCOUNTING+

We partnered with the Center for Audit Quality (CAQ) Accounting+ program to offer resources for high school and college students from underrepresented groups to discover the value of an accounting career.

The \$575,000 grant to this program invests in priority communities identified by the CAQ, including Black/African American students and Hispanic/Latino students. This investment creates a pathway to discover the potential and rewards of pursuing a career in accounting.

## PHD PROJECT

The PhD Project works to enrich the talent pipeline by increasing diverse representation of leadership within education and the business environment. In creating access to education and development opportunities in the classroom and corporate setting, the PhD Project establishes inroads for students from historically underrepresented backgrounds to innovate and lead the future.

We're proud to support the PhD Project with a \$25,000 grant, bringing essential resources to their work.

## GIVEBACK GRANTS

The GiveBack Grants program empowers Moss Adams team members to support causes of which they're passionate by nominating a not-for-profit they have a personal connection to. In 2023, \$100,000 was donated across 10 organizations that focus on innovative solutions to social equity, environmental, and educational needs within our communities.

[SEE PAGE 7 FOR MORE ON GIVEBACK GRANTS](#)

## GIVING TUESDAY

Giving Tuesday serves as the premier end-of-year giving event, with a strong focus on social equity and inclusivity. The week long campaign saw a total of \$243,000 raised by Moss Adams team member donations, partner donations, and the foundation's match, with \$95,000 going toward social equity-focused initiatives.

[SEE PAGE 6 FOR MORE ON GIVING TUESDAY](#)



GIVING TUESDAY TOTAL IMPACT

# \$243,000



MORE THAN  
**\$95,000**  
 GOING TO THE  
**SEVEN**  
 BRG-SELECTED  
 NOT-FOR-PROFITS

In 2023, Moss Adams and the foundation celebrated the sixth annual Giving Tuesday fundraising campaign. All Moss Adams team members received \$25 from the foundation to donate during the campaign. The firm's seven business resource groups (BRGs)—which focus on diversity, inclusion, and belonging—each chose a not-for-profit to support.

#### DISABILITY BRG

##### Active Minds

Active minds advocates for mental health awareness. Specifically focusing on young adults, Active Minds aims to remind those struggling they're not alone and provide resources for teens and their parents to seek care.

#### ASIAN BRG

##### Asian & Pacific Islander American Health Forum (APIAHF)

The APIAHF works to improve and advocate for the health of Asian Americans, Native Hawaiians, and Pacific Islanders by providing policy and political analysis, research and data support, and more.

#### PRIDE BRG

##### GenderCool Project

The GenderCool Project champions transgender youth by working to change misinformed opinions about transgender people through speaking events, public engagements, and more.

#### FORUM W

##### Girl Scouts of the USA

This youth organization empowers girls and young adults to learn skills that teach them confidence, self-reliance, and the value of friendship.

#### LATINX BRG

##### Hispanic Alliance for Career Enhancement (HACE)

HACE helps employers find diverse and often underrepresented talent. Beyond hiring, HACE works with individuals to continue their career growth through all stages.

#### BLACK BRG

##### Journey Community Schools (JCS)

JCS works to improve the academic experience by engaging families and community partners. JCS cultivates a safe learning space for students, while empowering teachers to deliver a positive education experience.

#### VETERANS BRG

##### Travis Manion Foundation (TMF)

TMF provides support to veterans, their families, and the families of fallen heroes. They aim to empower individuals and communities through programs, events, and trainings to instill strong values such as leadership and responsibility.



10 X \$10,000

## GIVEBACK GRANTS

In 2023, the foundation piloted a new program, GiveBack Grants, which empowered Moss Adams team members to support causes of which they're passionate. Team members nominated a not-for-profit they felt connected to and positions social equity and inclusion at the center of their programming.

Ten \$10,000 grants went to organizations advancing social equity, environmental, and education initiatives. With the inaugural year's success, we're delighted to share **the GiveBack Grant program will remain a pillar of the foundation's grantmaking strategy** moving forward.

### GIVEBACK GRANT RECIPIENTS

#### Empower Youth Network

Promotes and inspires youth to lead safe, healthy, and successful lives by connecting them with the necessary resources to thrive.

#### FIRST Washington

Inspires youth from diverse backgrounds to participate in team-based STEM programs and skill-building.

#### Food Lifeline

Provides nutritional support to people facing resource insecurity and develops strategies to mitigate hunger at a systemic scale.

#### Girl Scouts of Northeast Texas

Creates opportunities for young women and girls to develop courage, confidence, and character—and make the world a better place.

#### Guide Dogs for the Blind

Connects individuals with visual impairments to guide dogs who promote independence and transform lives.

#### McKenzie River Trust

Protects, conserves, and restores more than 7,000 acres of land for fish, wildlife, water quality, and the people of Western Oregon.

#### MindsMatter Colorado

Connects students from under-resourced communities with the people, preparation, and possibilities to succeed.

#### National CASA

Supports court-appointed volunteer advocacy so children experiencing abuse or neglect can be safe, have a permanent home, and the opportunity to thrive.

#### North Helpline Emergency Services and Food Bank

Assists individuals and families in securing their basic needs that affirm their dignity and promote wellbeing.

#### Teen & Kid Closet

Provides children and youth experiencing resource insecurity with quality clothing and accessories at no cost.

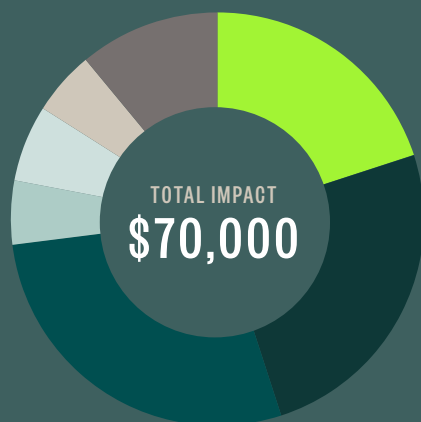
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# Environment

A commitment to creating a healthy environment for generations to come is one of our strategic priorities. Key elements of realizing our environmental and sustainability goals are the annual Earth Day giving campaign and responsive disaster relief grantmaking for communities most affected by climate change inequities.





Council for Native  
Hawaiian Advancement

Trust for Public Land

Hawai'i Community  
Foundation

Waterkeeper Alliance

Maui  
Food Bank

Charitable Giving

Clean Air Task Force

Additional team member donations and foundation matching beyond environment-focused charitable giving is reflected in overall charitable giving and matching totals, not in this chart.

## MAUI FIRE RELIEF GRANTMAKING

In 2023, Maui experienced unprecedented fires that forever changed its natural and social landscape. In response to this event, the foundation and Moss Adams team members held a giving campaign in support of three not-for-profits. Between donations and the foundation's match, \$95,000\* in essential funds was provided to relief and recovery efforts.

**\$13,600**

### Council for Native Hawaiian Advancement

Provided resources quickly and efficiently to communities affected by the fires, including resources for health, shelter, and rebuilding.

**\$17,200**

### Hawai'i Community Foundation

Provided grant funding to numerous not-for-profit and on-the-ground partners to serve community needs following the fires.

**\$19,700**

### Maui Food Bank

Partnered with various organizations throughout Maui County to distribute food immediately following the fires and provides ongoing food assistance to those in need.

## EARTH DAY

Each April, we celebrate Earth Day by holding a Moss Adams team member fundraising campaign matched by foundation dollars. In 2023, we invested \$23,300\* into three not-for-profits that protect, sustain, and improve the environment while also focusing on resource equity.

**\$3,500**

### Clean Air Task Force

Advocates for change in technologies and policies to decarbonize the global energy system and address climate change.

**\$4,380**

### Trust for Public Land

Creates parks and protects public land for people to provide healthy, livable communities with equitable access for generations to come.

**\$3,800**

### Waterkeeper Alliance

Protects the right to clean water in communities around the world for swimmable, drinkable, and fishable water, in addition to holding polluters accountable.

*\*Total includes foundation matching*

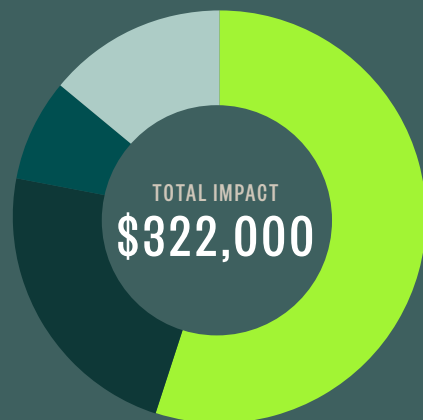


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# Education

We're committed to creating pathways for the next generation to become leaders, thinkers, and innovators. Educational equity and increased opportunity for all are the focal points for our commitment to education.





**University Charitable Giving & Matching**  
\$178,000

**Junior Achievement\***  
\$25,000

**Ignite Scholarships**  
\$75,000

**Project Run With It**  
\$44,000

University charitable giving and matching totals reflect all donations made by Moss Adams team members, partners, locations, and the foundation's matching and granting.

*\*In 2022, the foundation granted \$25,000 to Junior Achievement to support 2023 programming. This is reflected in education-related giving totals and this chart.*

## EDUCATION AND UNIVERSITY PARTNERSHIPS

In 2023, we celebrated our 32nd year of supporting education-focused not-for-profits that elevate the next generation of leaders and innovators. This dedication ensures students can envision a future in accounting, business, and related fields and are provided a pathway to opportunity.

In alignment with the firm's commitment to inclusion and belonging, we work with organizations dedicated to uplifting underrepresented students and furthering equity within the education space.

**32**  
YEARS

### UNIVERSITY CHARITABLE GIVING & MATCHING

Between contributions made by Moss Adams team members, partners, locations, and the foundation's match, \$178,000 in essential funds were provided to 65 universities and colleges across the United States. Through support for scholarships, professorships, and accounting programs, we're investing in systems-level change.

**16**  
YEARS

### BETA ALPHA PSI, PROJECT RUN WITH IT

Moss Adams and the foundation partner with Beta Alpha Psi to hold Project Run With It. This competitive consulting challenge offers students the opportunity to solve real-world business problems in support of local not-for-profits. In total, \$44,000 in funding supported the event and not-for-profits served by each winning team's chapter.

**10**  
YEARS

### IGNITE SCHOLARSHIPS

This year, \$75,000 in scholarships went to 30 students pursuing a bachelor's degree in accounting and related fields. Each student received a \$2,500 scholarship alongside a Moss Adams mentor and an invitation to the Moss Adams signature leadership program, TakeOff!, which focuses on elevating underrepresented teammates.

**04**  
YEARS

### JUNIOR ACHIEVEMENT USA

In partnership with Junior Achievement USA, a \$25,000 grant went toward supporting the development of data-driven, culturally and linguistically responsive financial education programming for high school students from underrepresented communities.





## MOSS ADAMS FOUNDATION BOARD

2023 was an impactful year for the foundation. We're delighted to reflect on a year of growth and success as we continue developing meaningful, inclusive giving strategies. This work isn't possible without the dedicated efforts of the Moss Adams Foundation Board, who led strategic shifts in our investment strategy and leant a breadth of expertise to changemaking efforts.

### BOARD MEMBERS:

**Olga Darlington**, she/her, partner, Everett

**Liz Dollar**, she/her, partner, San Francisco

**Melissa Harman**, she/her, partner, Los Angeles

**Guy Knuf**, he/him, partner, Orange County

**Eric Miles**, he/him, chairman and CEO, Portland

**Jennifer Price**, she/her, partner, Portland

**Lisa Todd**, she/her, partner, Albuquerque

### STANDING MEMBERS:

**Tricia Bencich**, she/her, associate director, Seattle

**Rae Miller**, she/they, manager, Portland

**Silke Olsen**, she/her, director, Seattle

**Jana Peterock**, she/her, manager, Seattle

**Varonica Ragan**, she/her, director, Seattle

**Jen Wyne**, she/her, chief talent officer, Seattle





## ABOUT THE MOSS ADAMS FOUNDATION

The Moss Adams Foundation is an independent 501(c)(3) not-for-profit with a vision to be a catalyst for equity and opportunity that has a lasting impact. It cultivates opportunity in the communities Moss Adams serves by investing in social equity, education, and the environment. Through grantmaking, giving programs, and volunteerism, the foundation fosters a culture of community commitment aligned with the values of Moss Adams and its people.

**[mossadams.com](https://mossadams.com)**

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