Giving back to the communities where we live and work

2018 RSM US FOUNDATION GIVING REPORT
The RSM US Foundation Board of Directors is excited to share its first giving report, and we hope you enjoy this look at the foundation's impact.

Stewardship is at the core of every decision the foundation board makes. It is gratifying to see how our firm has embraced the foundation's mission and, more importantly, to observe the growing impact of the foundation's giving programs, which totals $9,890,941 since inception.

We want to thank all RSM owners and employees for supporting the RSM US Foundation as we continue to work on our firm’s giving strategy while enhancing the RSM experience for our clients, colleagues and communities.

Sincerely,

Doug Opheim,
Chairman of the RSM US Foundation
Since 1926, stewardship has been one of RSM’s core values. It’s important to our people and our firm that we give back to the communities where we live and work. In 2015, we launched the RSM US Foundation to enhance the giving that was already happening in our offices across the country.

The mission of the foundation is to build tomorrow’s middle market leaders by supporting programs focused on education, as well as organizations that serve youth in the areas of hunger, housing and health. Our foundation’s programs reflect our roots in stewardship with a clear focus on the future.

**A STRONG START**

**BY THE NUMBERS**

- **Birdies Fore Love**
  - $6,379,045

- **University Giving**
  - $1,412,434

- **Dollars for Doers**
  - $785,026

- **Other giving**
  - $1,314,436

- **Total Giving**
  - $10,531,731
FOUNDFATION SUPPORT FOR
RSM’S BIRDIES FORE LOVE

Through Birdies Fore Love, our firm and our foundation have a proud history of benefiting local nonprofit organizations focused on enhancing educational outcomes and the quality of life for children and families. In 2015, the RSM US Foundation provided its first match to encourage employee engagement and fundraising goals, and the program’s impact on communities has increased each year. In 2018, RSM offices came together in support of 73 local charitable organizations.

Impact
Vision screening services and access to glasses for children ages 3–5. Racially and culturally inclusive books, educational games and toys. Experiential learning support. These are just some examples of how the Minneapolis Birdies Fore Love funds are being put to work at the Wilder Complex.

Investing in Kids (INK!) is a nonprofit organization in northeast Florida that provides programs and classroom resources to promote the academic success of students and teachers. Since 2016, our Jacksonville office and local community involvement in Birdies Fore Love has helped the RSM US Foundation donate over $400,000 to INK!, allowing it to expand its services and have a greater impact on the community—from school readiness programs to offering low-income, at-risk students a unique opportunity to escape the cycle of poverty through education.

ENHANCING VOLUNTEER TIME THROUGH DOLLARS FOR DOERS

Launched in 2015, Dollars for Doers’ impact has grown each year as more individuals and groups leverage the program. The RSM US Foundation provides grants to match employees’ direct individual or team volunteer time, including Volunteer Day and stewardship events at conferences, serving charitable organizations that align with the foundation’s mission.

Impact
First-Choice Advisor award winner and avid skier/snowboarder, Shannon Neville, used her Dollars for Doers grant opportunity to match her volunteer time at Adaptive Sports Foundation in New York. She shares her passion by teaching children with special needs to snowboard.

New employees and Pathways participants devoted volunteer hours to various charitable activities during their events celebrating Junior Achievement’s 75th anniversary. Our Starting Your Career participants completed a variety of team challenges and collected vouchers to the General Store, then worked together to create and decorate care packages for children in need.
“Coming from an organization like the RSM US Foundation, which prides itself on supporting middle market leaders, impactful charities and committed students, this scholarship means so much to me. The Power Your Education scholarship allows me to further work toward my ambitions so one day I can give back to the community which has given so much to me. I am excited to internalize the values of RSM to empower myself and others.”

Aekta Mouli
International business, management information systems and marketing major at University of Minnesota

“Power Your Education is more than a monetary investment by RSM. It is the empowerment that comes from others believing in my ability to succeed; it is the relief from the financial burdens of my undergraduate and graduate degrees; it is the gratitude for a firm that values investing in the next generation.”

Savannah Mabry
Accounting major at University of Georgia

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Bobby Ye
Business economics major at University of California, Irvine

“As the first person in my family to attend college here in the United States, the rising cost of tuition is one of the obstacles that I face in my pursuit of higher education. The Power Your Education scholarship is very important to me because it provides me with the financial support to cover tuition so that I can freely pursue my passion for learning in the field of accounting.”

Impact
The RSM Impact Fund at Salisbury University supports the recruitment and retention of accounting faculty, and provides scholarships and professional development for both accounting faculty and deserving students.

Donations establishing the grant and the RSM US Foundation match will fund the university’s Partners in Excellence in Accounting Fund and sponsor an RSM Faculty Fellow for the 2018–19 academic year.

We make a difference for the next generation of business professionals through our scholarship programs:

- University Giving Match—supporting educational initiatives in business, accounting and entrepreneurial studies by matching RSM owner and employee donations to colleges and universities
- Power Your Education—awarding students with scholarships and invitations to participate in RSM’s Pathways Summer Leadership Program.
- RSM US Foundation Scholarships—awarding grants to business students at our focus universities

SUPPORTING EDUCATION

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OTHER PROGRAMS

The RSM US Foundation finds ways to help others during times of need and support stewardship in others.

RSM US ALLIANCE STEWARDSHIP

Because we understand the importance of stewardship, we like to promote it in others. In 2018, our foundation funded the RSM US Alliance Stewardship Award, which provided $25,000 in matching grants to RSM US Alliance clients to support their stewardship activities.

Impact

In 2018, one award winner, Gilmore Jaslon Mahler, Ltd. (GJM) continued its support for Big Brothers Big Sisters of Northwestern Ohio by hosting 500 guests—including “Bigs” and “Littles,” and family members—at a holiday party complete with gifts, food, bowling and a visit from Santa Claus. Preparation begins months ahead of the event and GJM staff devotes roughly 200 hours—from planning to clean up—ensuring the event is a success. The goal? To offer a night of fun, nurture mentor relationships and encourage more mentors to get involved in making a difference in children’s lives.

DISASTER RELIEF

RSM and the RSM US Foundation are committed to supporting our people and their communities when affected by federally declared natural disaster.

Impact

In 2018, Gina Guarino, tax processing specialist senior, and her family lost their home and belongings to a flood during Hurricane Florence. “Our one-story home took on over 7 feet of water and was not habitable. RSM came in quickly to not only offer moral support, but the RSM US Foundation was able to help us with our immediate needs. My home office and co-workers rushed to our aid, and even another office in the area put together donations for my family. When I learned of my home flooding to the roof, I had no idea how we would make it, but I knew we would. RSM, as a company, and my local RSM family have played a huge role in my family being able to move forward with rebuilding our lives.”
For the third year, young family members of RSM employees submitted their original artwork for a chance to be featured on one of our firm’s five holiday cards. Employee vote decided the winning designs, and each winning artist selected a charitable organization aligned with our foundation’s mission to receive a $1,000 grant.

**Impact**

In 2018, five charities—East Ridge Cheer PSO, Boys Town Nevada, No Kid Hungry, Harrison Elementary School and the Livingston Public Library—received funds through the holiday card contest.

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**GIRL POWER, SNOW GIRL**  
Ivanka, age 4

**NATURE IN WINTER**  
Helena, age 15

**SNOW GLOBE**  
Jaxon, age 7

**HOLIDAY TIME IS FAMILY TIME**  
Aarav, age 9

**SNOWMAN HAND**  
Riley, age 4