FISCAL YEAR 2017 ANNUAL REPORT

THE POWER OF BEING UNDERSTOOD
AUDIT | TAX | CONSULTING
RSM remains committed to its vision to be the first-choice advisor to middle market leaders globally.
DEAR CLIENTS, COLLEAGUES AND FRIENDS,

On behalf of the RSM US LLP Board of Directors, I am pleased to present RSM’s Fiscal 2017 (FY 2017) Annual Report.

Thanks to the steadfast commitment of our partners and professionals to provide excellent service to our clients, RSM continued to grow and make strong progress on our strategy in FY 2017. We have almost reached the $2 billion mark in annual revenues, and even more importantly, we have enhanced our ability to be both a first-choice advisor to our clients and a great place for people to work.

Our success is predicated on the strong relationships we foster with our teams, our clients and our communities. As we look to RSM’s future vision for 2022 and beyond, we believe that how we deliver services will change, but that people will still seek strong, long-term relationships with people and organizations that can help them achieve their best. It is here that RSM plans to distinguish ourselves.

Thank you for your relationships with RSM and your support of our vision and strategy.

Sincerely,

BOB JACOBSON
CHAIRMAN OF THE RSM US LLP BOARD OF DIRECTORS
MESSANGE FROM JOE ADAMS
RSM US LLP MANAGING PARTNER AND CEO

DEAR CLIENTS, COLLEAGUES AND FRIENDS,

RSM is on a journey to become the first-choice advisor to middle market leaders globally. To achieve our vision, we must be relentlessly focused on the experiences our clients have working with us and the experiences our talent has working for us. In FY 2017, we made many important investments in support of this journey and we solidified plans for a forward-looking strategy—Vision 2022—that we believe will enable us to continue our momentum in the years ahead.

The RSM Talent Experience is a critical component of our strategy now, and in the future, because engaged professionals who feel confident in their careers and supported in their lives outside of work provide the best service to our clients.

Based on employee feedback, we redesigned our performance management and feedback processes and systems, introduced greater transparency into our compensation programs and enhanced our flexibility offerings in FY 2017. We also introduced a new employment branding campaign centered on “The Power of Being You,” which highlights the unique skills, knowledge and abilities of our people. We believe all of these enhancements to our talent experience will continue to advance our position as a firm that top talent seeks out to grow their careers.

The RSM Client Experience is an equally crucial part of our strategy because it is by providing outstanding experiences to our clients that we earn the right to be their first-choice advisors.

In FY 2017, we completed our semiannual client loyalty tracking study, which shows we are making strong progress on the key components of our client experience that are most important to our clients. We also introduced our new First-Choice Advisor Center, which will help enhance the advisory skills of our professionals. Finally, we enriched the thought leadership we provide for and about the middle market through a new partnership with the U.S. Chamber of Commerce on our RSM US Middle Market Business Index and a variety of new programs supporting our key industries. We believe these enhancements to our client experience will continue to advance our position as a firm that middle market leaders seek out to support their businesses.

Our laser focus on our strategy has enabled our firm to achieve growth and success in FY 2017, and it put us in a position that we could make these important investments that we believe will accelerate our progress towards our vision for 2022 and beyond.

On behalf of the full RSM US LLP leadership team, I thank you all for your relationships with, commitment to and support of RSM.

JOE ADAMS, RSM US LLP MANAGING PARTNER AND CEO
OUR COMMITMENT TO QUALITY

RSM US LLP is dedicated to quality and professional excellence. Our audit, tax and consulting practices have established policies and procedures unique to each line of business, to ensure quality is maintained and risk is mitigated throughout the firm.

AUDIT
Our system of quality control for our audit practice is designed to provide reasonable assurance that our firm and our personnel comply with professional standards and applicable regulatory and legal requirements, and that our firm issues reports that are appropriate in the circumstances. The elements within the system of quality control are established by Statements on Quality Control Standards issued by the AICPA and the requirements of the PCAOB. Those standards and requirements and our system of quality control encompass:

• Leadership responsibilities for quality control within the firm
• Relevant ethical requirements
• Acceptance and continuance of client relationships and specific engagements
• Human resources
• Engagement performance
• Monitoring
Our system of quality control consists of policies designed to achieve the objectives of the system and the procedures necessary to implement and monitor compliance with those policies. Our firm emphasizes that each individual has a personal responsibility for quality and requires each professional to be familiar with these policies and procedures.

TAX
Our tax practice uses a tax quality dashboard (dashboard) to identify and measure activities in the tax practice that promote high-quality client service, ethics and professionalism, and prudent risk management. These activities are determined jointly by RSM tax leadership and the national office of risk management, and take into consideration regulatory requirements, ethics rules and RSM policies.

The dashboard provides a means for collecting and reporting information concerning activities that affect quality, ethics and risk in the tax practice. This helps to focus on appropriate actions necessary to improve future performance for both individual professionals and the firm as a whole.

CONSULTING
Our consulting practice has deployed an administrative inspection program. The administrative inspection program ensures client acceptance and engagement administration is compliant with firm policies and focuses on the following areas:

• Assessing compliance with firm policies, including:
  • Client acceptance policies
  • Basic engagement management and arrangements
  • Perception of quality and project clarity
• Identifying any significant gaps or changes in critical aspects of the acceptance process
• Reporting at the practice and individual level
GROWTH

SUCCESSFULLY SERVING THE MIDDLE MARKET

RSM REPORTS ANOTHER YEAR OF SOLID REVENUE GROWTH

Thanks to the commitment of our partners and professionals to provide excellent service to our clients, RSM has achieved another year of solid revenue growth. This builds on a five-year trend that has enabled us to make strategic investments that will drive our business toward our strategic vision for 2022 and beyond. This year we added new markets in Texas in support of our middle market strategy, and we invested in our client and talent experiences, which we believe will enable our growth and success in serving clients for years to come.
RSM has delivered another strong year of revenue growth with total FY 2017 revenues of $1,979 million, an increase of $133 million or 7.2 percent over the prior year.
RSM continues to expand across the United States through targeted mergers and acquisitions. This year we focused on expanding in Texas, a critical market for middle market businesses.
This year, the RSM leadership team spent time validating the firm’s vision for 2022. As we look to the future, our vision to be the first-choice advisor to middle market leaders globally remains unchanged. We believe the middle market will continue to expand, and we are committed to helping leaders of these businesses through their opportunities and challenges.

This year, we have adjusted our purpose to be more all-encompassing of the various stakeholders our business serves. Supporting our people and the communities in which we live and work is core to how RSM operates, and we believe it is important to reinforce this commitment in our purpose. Our people agree, as both staff and partners helped develop our new purpose statement.

We still believe we will sustain and thrive by delivering an exceptional RSM Client Experience, continuing our commitment to the middle market, empowering passionate, innovative teams through our RSM Talent Experience and cultivating RSM promoters in the marketplace. In fact, as routine tasks become increasingly automated, we believe it is our strong relationships and the ideas and insights we bring that will provide value to our clients and the marketplace.

Our values of respect, integrity, teamwork, excellence and stewardship are the foundation of our firm, and they will continue to guide us in all we do as we look to 2022 and beyond.
VISION 2022

RSM'S VISION, PURPOSE, STRATEGY AND VALUES WILL GUIDE OUR PATH TO 2022 AND BEYOND

Respect ■ Integrity ■ Teamwork ■ Excellence ■ Stewardship

Values

Strategy

Purpose

Vision

First-choice advisor to middle market leaders globally

Deliver the power of being understood to our clients, colleagues and communities

- Deliver the RSM Client Experience
- Commitment to the middle market
- Empower passionate, innovative teams
- Cultivate RSM promoters
OWNING OUR FUTURE

MIDDLE MARKET FOCUS
RSM IS COMMITTED TO BEING THE FIRST-CHOICE ADVISOR TO MIDDLE MARKET LEADERS GLOBALLY

The middle market is a vibrant contributor to the U.S. and global economy. It accounts for approximately 40 percent of U.S. gross domestic product and one-third of jobs, yet it is often overlooked. RSM believes it is our responsibility as advisors to middle market businesses to raise the visibility of their contributions and increase awareness of the opportunities and challenges they face.

Our focus on the middle market is unparalleled in our industry. Each month, RSM chief economist, Joe Brusuelas issues The Real Economy, a publication focused on the impact of macroeconomic issues and trends on middle market businesses.

The Real Economy provides monthly economic information and insights for and about the middle market and helps shine a light on the unique needs and opportunities of this important segment of our economy.
We also conduct comprehensive research on the middle market through quarterly surveys administered by Harris Poll. This research feeds our proprietary RSM US Middle Market Business Index (MMBI)—a quarterly report on the economic conditions in the middle market developed in collaboration with Moody’s Analytics. In 2017, we welcomed the U.S. Chamber of Commerce as a strategic partner in the MMBI to help us expand the reach of the index and add voice to this important segment of the U.S. and global economy.
OWNING OUR FUTURE

RSM CLIENT EXPERIENCE
DELIVERING A DIFFERENTIATED CLIENT EXPERIENCE TO MIDDLE MARKET LEADERS

In 2012, RSM put a stake in the ground to be the first-choice advisor to middle market leaders globally—a vision we are achieving by ensuring clients consistently experience The Power of Being Understood®. Our global brand promise sets the expectation for unparalleled client experiences.

We chose this approach because being a trusted advisor who understands our clients is what middle market companies have told us is important to them, and what our employees have told us will help clients achieve better outcomes and feel empowered to move confidently toward the future.

RSM’S FIRST-CHOICE ADVISOR CULTURE ENSURES CLIENTS EXPERIENCE THE POWER OF BEING UNDERSTOOD

We strengthen our client-centric culture by regularly gathering and sharing client feedback and consistently applying those findings to mobilize our people around the common goal of understanding clients and tailoring our approach to each client’s needs and expectations.

Staying grounded in clients’ needs and expectations. In FY 2017, we completed our Client Loyalty Tracking Study, one of several tools RSM uses to regularly gather client feedback to understand what our clients expect from us, how we live up to those expectations and how we can continuously improve. We heard from more than 2,500 RSM clients and 500 nonclients, who rated their current preferred providers, and we continued our trend of steady improvement in our ratings. In addition, based on how nonclients rated their preferred providers, we outpaced them in several important areas, including the knowledge of our professionals, performance of our service teams and quality of our audit and tax services.

“RSM has a deep understanding of our work and purpose as a firm. As a result, their strategic advice is as valuable as their business and tax advice.”

TONY CHIGOUNIS, RED FOX COFFEE MERCHANTS LLC
Client feedback influences business decisions. RSM’s client experience measurement system is unique in our industry, and the data is analyzed across different aspects of our business to help us set high standards for client service that are relevant to middle market companies. The survey results are communicated across our firm so everyone has the same understanding of what’s important to clients. The information influences strategic improvement opportunities in service lines, touch points, account relationship management and team performance.

93% of our clients said we do what we say.

The RSM client experience in FY 2018 and beyond

We learned a lot from our clients and nonclients this year, and we are taking action across the firm to ensure we provide a first-choice advisor experience in every interaction.

Thought leadership on key issues. As the leading authority on the economic, business and industry issues, clients are looking to RSM to provide even more thought leadership on the issues that are relevant to the middle market, including industry and technical expertise to help clients interpret the impact of these issues and take action to improve business outcomes.

First-choice advisor talent. We continually hone our advisory skills to bring clients new ideas and additional value. In the coming year, we will accelerate efforts to evolve our First-Choice Advisor Center, announced in February 2017, as a resource center to provide a comprehensive learning and professional development program for our people to enhance their ability to help clients achieve better outcomes.

Collaboration and idea sharing. Collaboration is an important aspect of our first-choice advisor culture to bring clients relevant insights and integrated solutions to help them improve their business, anticipate risks or challenges, and identify new opportunities.

With understanding as the cornerstone of our brand, the power of being understood empowers a collaborative first-choice advisor spirit among our people and a passion for helping our clients shape their futures.

95% of our clients said RSM people have a genuine interest in helping them.
OWNING OUR FUTURE

RSM TALENT EXPERIENCE
EMPOWERING OUR PEOPLE TO ENHANCE THEIR VALUE AND BUILD SUCCESSFUL CAREERS

At RSM, we recognize and celebrate the fact that each of our 9,000 professionals is unique. And just as with our clients, we strive to deliver the power of being understood to our people in every interaction. We’re always working to further enhance the RSM Talent Experience, ensuring our people can harness their potential and build successful careers in line with their unique personal and professional aspirations.

“The enhancements we’re making are all designed to help our people thrive by understanding and leveraging their strengths and continuing to develop their skills in order to provide better results for our clients and successful careers for themselves and their colleagues,” said Katie Lamkin, chief human resources officer.

ENHANCING OUR TALENT DEVELOPMENT CULTURE
This year, we continued on our multiyear journey to invest in and implement enhancements to our talent-related programs, processes and technologies. The changes we’ve made are based on direct feedback from our people and are designed to help them better develop their skills, serve our clients and grow their careers.

In FY 2017, we introduced additional resources to help our professionals understand what it takes to be successful at RSM and how they’re performing, as well as launched new technology for feedback, goal-setting and performance evaluations. Together, they support a culture of continuous feedback, coaching and development. We also introduced greater transparency into our compensation programs, which more clearly links performance and rewards.

THE RSM TALENT EXPERIENCE
Our talent experiences the power of being understood.

Empowered to move forward with confidence—personally and professionally

Talent-centric focus
Enduring relationships
Deep understanding

We are RSM.
We empower each other to enhance our value and build successful careers at our firm and beyond. We build rich, enduring relationships based on a profound understanding of each other, our goals and our aspirations. Because when we feel truly understood, we are empowered to move forward with confidence—personally and professionally. This is the power of being understood. This is RSM.
OWNING OUR FUTURE
RSM TALENT EXPERIENCE

In FY 2018, we will continue to embed these tools, processes and resources into our culture to support our people’s personal and professional growth. We’ll also be adding training to better equip our leaders with effective coaching skills and connecting each individual with leaders who are committed to helping them advance their career and achieve their personal and professional goals.

DEVELOPING FIRST-CHOICE ADVISORS
We are committed to building our people’s capabilities as trusted advisors to help them better serve their clients and grow their careers. In addition to our technical training, we added more leadership development and industry training last year and will be increasing our e-learning offerings to provide more relevant training in the moment and accelerate their capabilities as trusted advisors.

ENGAGING OUR PEOPLE FROM DAY ONE
We are also continuing to enhance our internship, externship and onboarding programs to help our people experience the power of being understood from their very first day with the firm. Through enhanced experiences, training opportunities and personal connections, we want to be sure our newest professionals understand how their unique perspectives and talents help the firm achieve its vision.

BUILDING A TALENT DEVELOPMENT CULTURE
We are on a multiyear journey to enhance our talent-related programs, processes and technology. These investments are helping our people own their futures through coaching and development in order to better develop their skills, serve our clients and grow their careers.

THE POWER OF BEING YOU
We recently launched a new video series highlighting the hobbies, interests and talents that make our people unique and how their personal experiences, insights and perspectives help us deliver exceptional service to the middle market.
GLOBAL SERVICES
BRINGING THE MIDDLE MARKET TO THE GLOBAL ECONOMY

RSM is a leader in bringing the middle market to global economies through our worldwide commitment to delivering The Power of Being Understood®. RSM US LLP is the U.S. member of RSM International, the sixth largest global network of independent audit, tax and consulting firms, providing access to more than 41,000 professionals in 120 countries.

Eighty-five percent of the U.S. middle market is either internationally active or evaluating the opportunity to become internationally active. With the rise in populism around the world, the complexity of doing business internationally is increasing. More than ever, companies need a trusted advisor who understands how to navigate the changing geopolitical climate wherever they currently operate or seek to do business. Over the past year, RSM has continued refining and enhancing its capabilities and service offerings to meet our clients’ changing global needs and opportunities.

INTERNATIONAL AND INDUSTRY INSIGHTS EMPOWER CLIENTS
RSM provides unique thought leadership on relevant international economic, business and industry issues and trends through our publication, The Global Real Economy. In the coming year, we will provide even more thought leadership on these and other issues that are relevant to internationally active businesses.

GCRS HELPS COMPANIES MANAGE FOREIGN REGULATORY REQUIREMENTS
RSM’s global compliance and reporting services (GCRS) help companies manage complex and diverse regulatory requirements from country to country through one engagement leader backed by our global network. In FY 2017, RSM brought GCRS services to more clients within the RSM network. In the year ahead, RSM will further enhance the capabilities of our proprietary Global Tracker system, giving clients a complete view of their global compliance strategy.

COUNTRY SPECIALISTS HELP CLIENTS REDUCE RISK AND INCREASE ROI
RSM’s country desk teams help companies navigate business, regulatory and cultural issues when entering a new market in a foreign country. The desks are staffed by professionals who provide real-time answers and perspectives to clients and prospects on both inbound and outbound business opportunities—all while bridging language and cross-cultural barriers. As our global reach and client needs have grown, RSM has expanded its country desk strategy to China, France, Germany, Ireland, Mexico, the United Kingdom (U.K.) and this past year, to the Netherlands. India and Australia desks are under development.

“Our internationally active clients appreciate being served by a highly capable global team that understands their issues and works with them to create a seamless, high-quality global client experience.” MIKE KIRLEY, RSM US LLP GLOBAL STRATEGY LEADER
GLOBAL MOBILITY PROGRAMS ENRICH TALENT DEVELOPMENT AND CLIENT EXPERIENCES

RSM’s global mobility program supports our strategy to create differentiated client experiences worldwide while creating new talent experiences for RSM people.

Expatriates provide experience and connectivity. RSM’s expatriate program provides multiyear assignments for experienced professionals in foreign countries. These individuals are assigned to the country desk in the host country and work closely with RSM network firms to enhance connectivity to our clients and ensure they receive the same RSM experience anywhere in the world. The expat program continues to expand and helps our people accelerate their own career growth.

Secondees provide resources for short-term assignments. Our secondment program provides short-term assignments for experienced professionals who want to learn more about regulatory and business practices in other countries, and staff assignments for junior professionals when resources are needed in other RSM network firms. Through this same program, RSM US hosts inbound professionals from other member firms to share best practices and promote expertise in U.S. standards, regulations and business practices.

Hosting professionals from other RSM member firms enhances relationships. This year, RSM US hosted approximately 200 professionals from other RSM network firms to meet with clients, attend training and continue to build relationships with colleagues in the United States. In addition, RSM US delegations have visited colleagues in China, Brazil, Mexico, U.K., Germany and other parts of the world.

INVESTMENT IN GLOBAL ACCOUNT MANAGEMENT TOOLS ENHANCES CONSISTENT QUALITY AROUND THE WORLD

Our clients expect the same level of quality and value when working with RSM domestically and internationally. We are actively involved in RSM International’s Centres of Excellence, which focuses on continuous improvement of core services by adopting consistent standards across the network. In the coming year, RSM US and RSM network firms will continue to work on global account management tools to increase collaboration across our network and with our clients.

INTERNATIONAL SERVICES OFFICE (ISO) CENTRALIZES COORDINATION OF GLOBAL CLIENT ENGAGEMENTS

Our ISO focuses on assisting our professionals and our clients in navigating the different languages, cultures and service needs when conducting business around the world. The ISO will continue deepening relationships with RSM International member firms in FY 2018 to help assemble the right client service teams to ensure clients experience the power of being understood around the world.

“RSM’s global mobility strategy is a differentiator—our expats find these experiences to be a real accelerator to build their careers and long-term relationships with our internationally active clients.”

TOM FERREIRA, RSM US LLP
GLOBAL MOBILITY LEADER

OWNING OUR FUTURE
GLOBAL SERVICES
OWNING OUR FUTURE
GLOBAL SERVICES

COUNTRIES WHERE RSM US LLP HAS PRESENCE/PROGRAM PARTICIPATION
- United States
  - Atlanta, Georgia
  - Boston, Massachusetts
  - Chicago, Illinois
  - Dallas, Texas
  - Los Angeles, California
  - New York, New York
  - Philadelphia, Pennsylvania
  - Raleigh, North Carolina
  - Stamford, Connecticut

- France
  - France desk
- Ireland
  - Ireland desk
- United Kingdom
  - UK desk
  - RSM US LLP expatriates
  - RSM US LLP short-term and long-term assignments
- Netherlands
  - Netherlands desk
- Germany
  - Germany desk
  - RSM US LLP expatriates
- China/Hong Kong
  - China desk
  - RSM US LLP expatriates
- Cayman Islands
  - RSM Delivery Center (RDC)
- Mexico
  - Mexico desk
  - RSM US LLP expatriate (2017)

COUNTRIES WHERE RSM HAS MEMBER FIRM COVERAGE
- Australia
  - RSM US LLP short-term and long-term assignments
- New Zealand
  - RSM US LLP short-term and long-term assignments
- India
  - RSM Delivery Center (RDC)
- El Salvador
  - RSM Delivery Center (RDC)
- United States
  - RSM US LLP's hosted short-term assignment

Tom Ferreira – global executive sponsor and global mobility leader for RSM US LLP
Mike Kirley – global strategy leader for RSM US LLP and chairman of the RSM International Board of Directors
INDUSTRY FOCUS
DELIVERING RELEVANT IDEAS AND INSIGHTS TO CLIENTS

RSM’s industry program brings together our client and talent experiences in a way that enables us to have relevant conversations with and bring insights to our clients, build integrated solutions across our lines of business and provide our professionals with meaningful knowledge that will accelerate their career development.

ALIGNMENT AND TRAINING
Each RSM professional at the manager level chooses one or more industries in which to build specialized knowledge in addition to their technical skills of audit, tax and consulting. They receive customized communications and training to help increase their industry expertise both online and through our national line of business conferences.

CLIENT AND MARKET INSIGHTS
In the last year, we enhanced the insights we bring to clients and the marketplace through our industry thought leadership.

RSM’s 2016 Manufacturing Monitor surveyed over 1,000 middle market manufacturing executives on key issues facing the industry, including globalization, technology and risk. The survey report was supplemented with videos and articles from RSM manufacturing experts highlighting ideas, insights and best practices in these areas throughout the year. We also took a deeper dive into the automotive sector to learn more about the issues and opportunities facing these businesses.
In partnership with Privcap, we introduced the Powerhouses of Private Equity quarterly video series. In each video, RSM’s national industry and private equity service leader, Don Lipari, sits down with fund founders, managers and other movers and shakers in the investment community to discuss a wide range of topics in the private equity community—especially those that operate in the middle market space.

We also enhanced thought leadership in consumer products and real estate through conferences and related video series on topics and issues important to these industries.

VISION 2022

As we look ahead to 2022, our industry program will focus on enabling RSM professionals at all levels with relevant industry knowledge at their fingertips and additional training on how to bring industry insights to our clients in a meaningful way. We believe this will enhance RSM’s client experience, accelerate our progress towards our vision to be the first-choice advisor to middle market leaders globally and enable our professionals to progress in their career paths.

OWNING OUR FUTURE

INDUSTRY FOCUS

“As we look ahead, our industry program will focus on providing our clients and professionals with industry insights at their fingertips.” DON LIPARI, NATIONAL INDUSTRY LEADER

POWERHOUSES OF PRIVATE EQUITY

Interviews with movers and shakers in private equity uncover opportunities and challenges in the industry.
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 our employees live and work. In 2014, the RSM US Foundation was established 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 serving youth in the areas of hunger, housing and health. The RSM US Foundation encompasses a number of programs that continue to grow and positively impact our employees and their communities.
SOCIAL RESPONSIBILITY

**University Giving:** RSM made history at the University of Northern Iowa (UNI) in February 2017 when it announced the formation of a $1 million chaired professorship to enable the university to continue to attract and retain high-quality educators. The RSM Chaired Endowment is the third for UNI’s College of Business Administration and the first for its accounting department. Additional university gifts in the year ending April 30, 2017, include the RSM Accounting Scholarship at the University of North Dakota, RSM’s Wilfred H. Heitritter Excellence in Tax Fund at the University of Iowa and the RSM Facility Culture Initiative at the University of Illinois at Urbana–Champaign. The gifts totaled $342,334.

**Power Your Education:** Every day, RSM professionals deliver the power of being understood to today’s middle market leaders. To build tomorrow’s leaders, the RSM US Foundation granted $100,000 in scholarships for the 2017–2018 academic year to 10 students ($10,000 each). In addition, the foundation’s national scholarship program provided each scholarship recipient with an invitation to participate in RSM’s externship (Pathways) program.

**Birdies Fore Love:** RSM’s Birdies Fore Love program is a giving platform tied to The RSM Classic, a PGA TOUR event sponsored by RSM. Each year, RSM makes a difference for youth through Birdies Fore Love, thanks to stellar participation from its partners, principals, employees, clients and friends of the firm with a generous funding match provided by the RSM US Foundation. The seventh annual RSM Classic (Nov. 14–21, 2016) raised $2.2 million for children- and family-focused charitable organizations. This brings the grand total raised through the tournament since its inception in 2010 to more than $7 million. Of the $2.2 million raised during the 2016 tournament, $1.5 million was raised through Birdies Fore Love, and of that amount, nearly $970,000 was raised by RSM partners, principals, employees, clients and friends of the firm, with another $540,000 donated by the RSM US Foundation through its matching program.

**Volunteer Day:** Each year during RSM’s Volunteer Day, employees and clients join forces to showcase the firm’s core value of stewardship. In FY 2017, more than 2,900 RSM employees and clients participated in 175 volunteer events across the country to help sort and box food donations, read to children, sort and inspect donated clothing, distribute food, package meals for children, build homes and garden beds, landscape yards for schools, parks, shelters and nonprofits, and participate in many other activities to help those in need. More than 100 charities benefited, including Ronald McDonald House, Habitat for Humanity, Second Harvest Food Bank, Project Sunshine, Junior Achievement and many more. Charities aligned with the RSM US Foundation’s mission received Dollars for Doers group grants totaling $73,392.

**Dollars for Doers:** RSM partners, principals and employees have a passion for supporting charities that make a difference for youth. Through its Dollars for Doers program, the RSM US Foundation matches our employees’ generous gift of time—personal or as groups of employees—with financial support. In its second year of the program, 182 grants were awarded totaling $181,160. Dollars for Doers grant totals now exceed $200,000 since the program’s inception in 2015.

$1.5 million raised through Birdies Fore Love.
Thousands of personalities make up RSM. Every member of our team brings unique insights and a passion for the middle market companies we serve. Our inclusive workplace celebrates the differences among our talented employees, while enabling them to embrace full ownership of their work and personal lives.

We approach our commitment to a diverse workplace in several ways, including:

- Dedicated leadership for culture, diversity and inclusion (CDI)
- Recruitment
- Support for diverse professional organizations, including NABA, ALPFA, Ascend and Out & Equal
- Training
- Investment in 11 employee network groups (ENGs)
- Unconscious bias and cultural dexterity education
- Diverse supplier and vendor development

Together, these strategies enable RSM to develop global leadership, integrate cultural differences, improve workforce productivity and exceed the expectations of our clients.
RSM’S LEADERSHIP FOR CULTURE, DIVERSITY AND INCLUSION

RSM devotes a full-time, dedicated team exclusively to our CDI efforts. Our national leader of CDI, Richard J. Caturano, is an RSM partner and member of the national leadership team. He is a founding member of the National Commission on Diversity and Inclusion at the AICPA and currently serves as chair of the Commission.

In addition, hundreds of RSM professionals devote time to internal workforce and workplace initiatives, as well as marketplace and community programs, including diverse organization partnerships, corporate citizenship, supplier diversity and diverse subcontracting.

EMPLOYEE NETWORK GROUPS CELEBRATE UNIQUENESS

Since 2014, RSM has supported ENGs that provide opportunities for volunteerism, professional development, mentorship and networking at all levels across the firm. Our 11 national ENGs bring together people with diverse experiences and similar interests. Each offers unique ways for all employees to grow and learn, while they celebrate all walks of life, genders, interests and backgrounds.

For its members, each ENG serves as a sounding board and a resource for communication and advocacy. RSM leaders look to our ENGs for innovative insights to help enrich experiences for our clients and our people. All employees are welcome to join all ENGs. In FY 2017, 20 percent or more than 1,900 individuals are ENG members.

BUILDING FOR TOMORROW

RSM’s diversity efforts include more than having a diverse workforce and inclusive workplace. It’s about all aspects of diversity. As we take CDI to the next level, we’ll work to become known as inclusive in the communities where we serve clients, contribute diverse perspectives to the business community and build our relationships with diverse suppliers. Our success in these areas will benefit our clients and the communities where we work and live.

“Our work is based on connecting with people. By fostering a culture of diversity and inclusion, we’re going to make our firm even better and be better able to serve our clients.” CATHARINE DEL RE, RSM PARTNER AND NORTHEAST REGIONAL STAR (WOMEN’S) ENG LEADER
SOCIAL RESPONSIBILITY

90–90–9: PURSUE YOUR PASSION
RSM HELPS EMPLOYEES PURSUE THEIR PassIONS

In celebration of our firm’s 90th anniversary in May 2016, we launched an employee contest, 90–90–9 Pursue Your Passion, which awarded nine employees with $90,000 ($10,000 each) and nine days of paid time off to pursue their passions. Because the program was such a success, we offered it again in January 2017 with another nine employees being selected from nearly 300 submissions.

Here is an overview of this year’s winners and the dreams they will be fulfilling throughout the year:

“ At RSM, we understand the importance of providing our employees with the opportunities and support they need to be successful, both on and off the job.”

DOUG OPHEIM, CHIEF FINANCIAL OFFICER AND CHAIRMAN OF THE RSM US FOUNDATION

Amanda Brown (manager; Harrisburg, Pennsylvania)—volunteer at The Bailey House and the Family House, facilities that provide respite to family members of hospitalized patients, and purchase “wish list” supplies.

Jay Brown (senior associate; Cedar Rapids, Iowa)—bolster America’s talent pool by sparking interest in STEM (science, technology, engineering and mathematics) by capitalizing on the Aug. 21, 2017, total solar eclipse—the first in the contiguous United States since 1979—through virtual reality, live streaming and in-person educational experiences.

Sarah Greyer (manager; Tampa, Florida)—hike Mount Everest, donating $1 for every meter of altitude hiked to a nonprofit organization in Nepal to help with earthquake recovery efforts.

Patti Leonard (administrative assistant; Greensboro, North Carolina)—establish the Sparky Foundation to help provide medical care for animals in need, and to rescue and rehome animals in high-risk shelters.
SOCIAL RESPONSIBILITY
90–90–9: PURSUE YOUR PASSION

“RSM offers outstanding programs to help their employees thrive personally and professionally. Being a winner of our Pursue Your Passion contest has not only been a gift to me personally, but professionally. Since winning, I’ve noticed an increased confidence and enthusiasm in myself when serving clients. It is my honor to represent the firm in this way.” **SHELLEY MORENO, SENIOR ASSOCIATE**

**Kyle McNamara** (senior associate; Las Vegas, Nevada)—complete construction of a shelter in the Philippines to keep residents safe during typhoons and other natural disasters, and install a well in a local village to provide water to villagers.

**Danielle Montes** (associate; San Antonio, Texas)—take quilting classes to fine-tune skills, and make and donate 24 quilts and 50 receiving blankets to Threads of Love, a nonprofit focused on premature babies; Setton Home, an organization that teaches parenting and life skills to teenage mothers; and Quilts for Kids, which focuses on children with life-threatening illnesses, children of abuse and children living at or below the poverty level.

**Shelley Moreno** (senior associate; Los Angeles, California)—provide 2017 Breast Cancer Thrivers’ Cruise scholarships and professional makeovers for a group of breast cancer survivors.

**Hunter Pearson** (associate; Gaithersburg, Maryland)—help his grandfather live his dream of returning to Normandy, to revisit life-changing experiences he had during World War II.

**Nathaniel Rubin** (associate; Atlanta, Georgia)—provide scholarships and medical supplies to enable five children to attend Camp Kudzu, a Georgia–based nonprofit that provides overnight camps and programs for children with Type-1 diabetes.
RSM HALL OF FAME
A CELEBRATION OF THE PEOPLE WHO HAVE HELPED SHAPE OUR FIRM

RSM’s Hall of Fame honors individuals whose outstanding contributions and stewardship have significantly enriched and shaped the firm over its long history. Our honorees embody RSM’s values and uphold our standards of excellence as the leading firm to middle market leaders globally.

This year, RSM proudly honors 10 inductees who are recognized as first-choice advisors in their own right and awarded the highest honor a current or past RSM employee or partner can receive from the firm. On behalf of RSM, our clients and our people, we thank this year’s inductees for their commitment to leave the firm in a better place through their many good works.

This year, RSM proudly honors 10 Hall of Fame inductees who are recognized as first-choice advisors in their own right.

Roy E. Barnes, Jr.
The firm’s first tax coordinator

Henry Allovio, Jr.
Founding director of the McGladrey Network in 1992

William D. Osmundson
The firm’s first consulting leader

Richard Evans
Assurance partner

Harold “Hal” E. Quill
Executive partner; regional managing partner; chief financial officer; group administrator; board of directors (1980–1987)
“As I look at this year’s class of inductees, I’m humbled by their contributions. They truly demonstrate the difference one person can make, and I’m grateful they chose to devote their talents to RSM. Each played a critical role in making RSM the leading firm we are today.”

JOE ADAMS, MANAGING PARTNER AND CEO
When you trust the advice you're getting, you know your next move is the right move. That's what you can expect from RSM. That's the power of being understood.

+1 800 274 3978
www.rsmus.com

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.

RSM® and the RSM logo are registered trademarks of RSM International Association. The power of being understood® is a registered trademark of RSM US LLP.

©2017 RSM US LLP. All Rights Reserved.

RSM® and the RSM logo are registered trademarks of RSM International Association.

The power of being understood® is a registered trademark of RSM US LLP.