reflects what we expect to achieve in the next five years and the unrivaled culture at RSM that will help us get there. Our culture is a powerful competitive advantage that differentiates RSM as the leading provider of audit, tax and consulting services for middle market companies, the thought leader on the issues clients care about most, and a leading employer with an inclusive and compelling talent experience. Together, we’ve all worked hard to build this culture and must continue to evolve and sustain it for our future and yours.
OUR PERSPECTIVE

HELPING OUR CLIENTS AND PEOPLE NAVIGATE CHALLENGES AND LOOK TO THE FUTURE

The world has recently faced a tremendous amount of change, from the ripple effects of the pandemic to global conflicts and their repercussions on the global economy. However, through these events, our leadership has developed solutions to help our people and the middle market effectively manage uncertainty and plot a course for continued success.

LETTER FROM JOE ADAMS

LETTER FROM JERRY MARTIN

SNAPSHOT
Dear Clients, Colleagues and Friends,

As I write my final annual report letter as RSM US LLP’s managing partner and CEO, I feel a tremendous sense of pride in RSM, our clients and all the people who work for us around the world. Thanks to you, we are in a very strong position to seize the opportunities in today’s changing world and create an even brighter future for our clients, colleagues and communities.

RSM has been on an incredible journey—particularly over the last 11 years as we have greatly increased the number of clients we serve; significantly expanded our talent; built outstanding business relationships; launched a philanthropic foundation; implemented a culture, diversity and inclusion program; and grown our business to $3 billion as we executed our strategy. We have carved out a unique position as the first-choice advisor to middle market leaders globally. I am honored and humbled to have been a part of it.

—Joe Adams
As I look ahead, I am energized by the opportunities I see for RSM, our clients and our people. There may be headwinds facing us, such as persistent inflation, supply chain challenges, war and ongoing civil and political unrest, but we have proven that together we can turn challenges into opportunities and thrive even in uncertain times. Our strategy for the next several years is aptly called, “Vision 100 ... Powered by our culture,” because it is our unique culture that puts RSM in such a strong position to serve our clients, develop our people and give back to our communities in compelling ways.

I also am extremely confident in our next managing partner and CEO, Brian Becker. Transformation amid this rapid pace of change will be one of the biggest challenges facing all businesses in the coming years—we see it all around us with technology and digital; new work paradigms; environmental, social and governance issues; diversity; and more. Brian is a leader who sees the opportunities created by change, and he has been leading digital transformations for our clients for the majority of his career. He is absolutely the right person to lead RSM on the next phase of our journey.

I feel so blessed for the opportunity to work with our wonderful partners, principals, employees, clients and communities for 43 years and for the past 11 as managing partner and CEO. I feel certain of RSM’s future success because of you, and I wish you the best. Thank you!

Sincerely,

Joe Adams
RSM US LLP Managing Partner and Chief Executive Officer
The world has recently faced a tremendous amount of change, from the ripple effects of the pandemic to global conflicts and their repercussions on the global economy. However, through these events, our leadership has developed solutions to help our people and the middle market effectively manage uncertainty and plot a course for continued success.

**LETTER FROM JERRY MARTIN**

**DEAR CLIENTS, COLLEAGUES AND FRIENDS,**

On behalf of the RSM US LLP Board of Directors, I am pleased to present the RSM US LLP fiscal 2022 annual report. The theme of this year’s report is “Vision 100 ... Powered by our culture”—a vision that is designed to take us to our firm’s 100th anniversary in 2026.

It can be challenging to plan for the future in such a rapidly evolving world. The last several years have brought unexpected changes, and it seems like each day we are faced with revolutionary ideas and innovations that bring both opportunity and challenge. While it can feel daunting at times, I am confident because we are facing the future together—with the strength of our RSM colleagues, our clients and our communities.

One significant role of the RSM US LLP Board of Directors is to be good stewards of RSM—understanding changes in the external environment and their impact on our firm, our people and our clients—as we oversee the evolution of our strategy. One of our primary tasks last year was selecting the firm’s next managing partner and CEO. We were fortunate to have a number of highly qualified candidates, and we selected Brian Becker to assume the role on Sept. 1, 2022. We specifically designed a long transition period, and we feel very pleased with how it has gone and excited for Brian to fully step into the role. We are also tremendously grateful to Joe Adams for his ongoing leadership and stewardship.

“At RSM, it’s our culture that makes the difference. Together, we are resourceful, innovative and purpose-driven—serving our clients, creating economic opportunities and giving back to communities.”

—JERRY MARTIN

RSM is resourceful and innovative in the face of change, and we remain steadfast in our vision to be the first-choice advisor to middle market leaders globally.”

—JERRY MARTIN
This transition is critical because it is the first of many as our longtime leaders prepare for retirement and new leaders take the helm. The board is committed to working with Brian, his leadership team and all RSM partners, principals and employees as we look toward the future, thrive in the face of new challenges and opportunities, grow and innovate, and drive an inclusive, vibrant culture.

RSM is resourceful and innovative to help lead change, and we remain steadfast in our vision to be the first-choice advisor to middle market leaders globally. I am confident we will continue our success together to our 100th anniversary in 2026 and beyond.

Sincerely,

Jerry Martin
Chair, RSM US LLP Board of Directors

RSM US LLP Board of Directors
The world has recently faced a tremendous amount of change, from the ripple effects of the pandemic to global conflicts and their repercussions on the global economy. However, through these events, our leadership has developed solutions to help our people and the middle market effectively manage uncertainty and plot a course for continued success.
The world has recently faced a tremendous amount of change, from the ripple effects of the pandemic to global conflicts and their repercussions on the global economy. However, through these events, our leadership has developed solutions to help our people and the middle market effectively manage uncertainty and plot a course for continued success.
As economic conditions evolve and our firm continues to grow, we have remained dedicated to our core mission: being the first-choice advisor to middle market leaders globally. Now more than ever, clients need the full power of RSM’s national and global capabilities and service offerings to support their business objectives. We are uniquely positioned to deliver timely, comprehensive solutions and trusted advice when and where our clients need them.

OUR FIRM

CREATING A CULTURE OF CLIENT SERVICE, QUALITY AND INTEGRITY FOR NEARLY A CENTURY

OUR PEOPLE AND LOCATIONS

QUALITY AND INDEPENDENCE

A SEAMLESS APPROACH TO GLOBAL SERVICE

VISION 100 ... POWERED BY OUR CULTURE
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OUR FIRM
CREATING A CULTURE OF CLIENT SERVICE, QUALITY AND INTEGRITY
FOR NEARLY A CENTURY

OUR PEOPLE AND LOCATIONS
A LOCAL PRESENCE COMBINED WITH AN EXTENSIVE REACH
Wherever our clients are, we have the people and resources to work with them.

NEW OFFICE OPENINGS IN FISCAL 2022:
RSM opened locations in Fort Worth, TX, Pittsburgh, PA, and Vancouver, B.C.

ACQUISITION ACTIVITY IN FISCAL 2022:

- **EDISON, NJ** (Washington, D.C., Toronto, ON) C Systems, LLC; C Systems Canada, LLC; and Confluence Global, LLC
  - Enhanced RSM’s nonprofit technology services and association management system solutions

- **DETROIT, MI** Rego Consulting’s ServiceNow practice
  - Expanded RSM’s digital transformation offerings

- **KITCHENER, ON** (Vancouver, B.C.) Business Improvement Group (BIG) and Revenue Services Group (RSG)
  - Enhanced RSM Canada’s credits and incentives practice

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QUALITY AND INDEPENDENCE

At RSM, we have spent nearly a century building a reputation for quality, integrity and client service excellence. Providing a quality product and maintaining independence across our many service offerings are cornerstones of our firm. We expect everyone at RSM to take personal responsibility to protect our reputation and deliver service in a way that is aligned with both our values and what our clients and the marketplace have come to expect from our firm.

All RSM people and practices are responsible for upholding our code of conduct, which is grounded in our values of respect, integrity, excellence, teamwork and stewardship, and outlines the standards of ethical behavior to which we hold each other accountable.

Each of our lines of business has rigorous standards for client acceptance and an inspection program. In addition, we deliver our audit, tax and consulting services in accordance with RSM policies, relevant technical and professional standards, and applicable laws and regulations.

RSM's audit practice has a system of quality control that 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 each circumstance. Read Our Commitment to Audit Quality and Professional Excellence for more details about audit quality at RSM.

Additionally, the RSM ethics and compliance hotline allows any RSM employee, client or vendor who sees, suspects or knows about fraudulent, illegal or unethical behavior to report it. The hotline is staffed by an outside organization that specializes in gathering the information needed to appropriately follow up with a concern. Concerned parties can file a report anytime, day or night, by phone (+1 800 913 5052) or online.
A SEAMLESS APPROACH TO GLOBAL SERVICE

ENSURING HIGH-QUALITY CLIENT EXPERIENCES

Globally active middle market companies need a trusted advisor who understands how to help navigate the complexities of doing business across international borders. This advisor should:

- Possess multicountry technical insight and a globally experienced workforce
- Understand how to navigate cultural and language differences affecting international business
- Have access to the resources of a multinational network embedded across the world's global markets

COUNTRIES WHERE RSM HAS MEMBER–FIRM COVERAGE

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TRUSTED FIRST-CHOICE ADVISOR TO MIDDLE MARKET COMPANIES GLOBALLY

RSM provides global insights about economic, business and industry issues relevant to client business needs. Insights relating to the global impact of the COVID-19 pandemic, global expansion strategies, tax reporting for international business travelers, middle market workforce patterns in the U.K., and tariffs and trade help our clients stay informed. We continue to expand our global tax, audit and consulting service capabilities to help middle market companies understand and adapt to global and regional issues.

Global methodologies ensure consistency and quality throughout RSM's international network. This includes leveraging best practices and common tools for all RSM firms to provide a consistent RSM experience. One example is RSM Orb, a global audit methodology and supporting platform that scales according to client complexity and circumstance. The methodology is deployed across RSM's global network to focus on client risk and provide deeper critical insights.

Globally active companies face significant and growing compliance challenges. Our global compliance and reporting services help clients manage their compliance and reporting needs through one global relationship leader, with support from a dedicated U.S.-based team and a robust global network. This past year, we helped clients' peace of mind that their foreign filing obligations were met, and mitigated the risks of missed deadlines and penalties with a convenient and cost-effective delivery system.

RSM Delivery Centers in India and El Salvador enhance the client experience by creating and delivering timely, cost-effective and high-quality solutions to improve business processes across service lines.

COUNTRY-FOCUSED SPECIALIZATION SERVES FOREIGN DIRECT INVESTORS AND EASES FOREIGN MARKET ACCESS

We continue to be a dominant firm for middle market foreign direct investors, leveraging our global business advisory capabilities and country experience to provide critical support for foreign direct investment (FDI) activity.

RSM's country practices provide a deep understanding of FDIs while helping clients navigate business, regulatory and cultural issues when entering new markets. Based in the United States, these professionals provide answers and perspectives on inbound and outbound business opportunities, and offer cross-border knowledge across our audit, tax and consulting services.
Global strength, local relationships

RSM US is a member of RSM International, the sixth-largest global network of independent audit, tax and consulting firms.

The year saw RSM International member firms transition from supporting clients through the pandemic to investing in a radically different future as COVID-19 becomes endemic. The adoption of new technology, evolving sustainability commitments and a wave of M&A activity among the global middle market were key drivers of growth.

Mutual and close collaboration between member firms form a global strategic ecosystem that allows RSM to serve clients seamlessly around the world. Read more about ways RSM’s global team is finding opportunity in change to help middle market business leaders grow and thrive internationally.

RSM International’s recent fiscal year results mark a seventh consecutive year of global growth and encompasses:

- 51,000+ Professionals worldwide
- 123 countries, including 40 new offices
- $7.3B combined revenues
- 3 new firms in Turkey, the Bahamas and Nigeria
- 15.8% year-over-year global revenue growth
VISION 100 ... POWERED BY OUR CULTURE

PREPARING FOR OUR 100TH ANNIVERSARY AND BEYOND

As we prepare for our 100th anniversary in 2026, RSM is holding true to the values, culture and first-choice advisor approach that have powered our success for 100 years while evolving and adapting our digital experience, strategic ecosystems and service offerings to lead into the future.

Our values and the 5 C's are core to who we are, and we are continuing to develop programs to embed them even more deeply into our firm. Our vision and purpose have been our North Star as we navigated COVID-19, social and political unrest, turnover, inflation, and more during the last several years. And our clients and people alike tell us our first-choice advisor approach is compelling and differentiating in the marketplace.

To lead into the future, we are pursuing four strategic pillars:
1. Lead the middle market
2. Drive an unrivaled inclusive culture and talent experience
3. Win with industry, agility and digital velocity
4. Maximize strategic ecosystems

This will enable us to lead the middle market with transparency, agility, industry relevance, diversity and digital velocity to empower our people to build vibrant futures, to ensure clients experience the power of being understood everywhere in the world and to maximize strategic relationships.
THE RSM EXPERIENCE

LEADING THE MIDDLE MARKET THROUGH TRANSFORMATIONAL TOOLS, SOLUTIONS AND INSIGHTS

Responding to the events of recent years has required quick thinking and innovative solutions. Our vision and perspective to understand industry and market shifts have enabled us to develop a vibrant environment that enables success for our clients and employees both now and into the future. By embracing innovation, being agile and remaining dedicated to our purpose, we are leading by example and delivering unparalleled value to the middle market.

REAL INNOVATION FOR THE MIDDLE MARKET

THE POWER OF THE RSM EXPERIENCE

THE DIGITAL EXPERIENCE

RSM FIRST-CHOICE ADVISOR AWARDS
REAL INNOVATION FOR THE MIDDLE MARKET

FOSTERING AN INNOVATIVE CULTURE

At RSM, we believe everyone plays a role in innovation to drive incremental and transformative change. Through our Acceleration Center for Innovation, we accelerate the speed and momentum of change by collaborating with our clients, colleagues and communities to deliver real-world practical approaches for our clients, while also equipping our professionals with the knowledge, skills and tools necessary to thrive in an evolving, digital world.

The RSM Acceleration Center delivers real innovation to the middle market by using emerging technology to create cutting-edge client solutions.

Everyone can drive real change

Whether someone has a big idea or a different perspective, we give our people a voice and a platform to drive real change. Through our Innovation Hub, RSM professionals participate in ideation challenges, events and communities to collaborate with colleagues across the globe.

Last year, we held our largest Innovation Challenge, a competition focused on bringing together teams of RSM professionals to develop innovative solutions that address business challenges to provide value for the people and organizations we serve and work with. More than 60 teams made up of 340 participants across the United States, Canada and El Salvador submitted business cases and prototypes of their innovative concepts. Topics ranged from automating business processes that provide cost and time savings for clients to creating new technology tools and internal programs.

The top ten Innovation Challenge ideas and other viable concepts were moved into RSM’s CEO Innovation Fund—a program designed to develop experiments and provide funding to help turn ideas into a reality.
Inspiring innovative communities

Our professionals train in the latest emerging technologies, learning to leverage data and automation to provide value to clients and embed digital capabilities into everything we do.

Some of the digital upskilling programs we launched last year include:

Blockchain Fellowship
A premier 30-day intensive program aimed at deepening the skills and experiences of RSM professionals in blockchain and digital assets

Digital Credentialing
A program to recognize RSM professionals who have gained skills and participated in automation, artificial intelligence, blockchain and data science programs, using digital credentials

Data Mining Competition
A real estate-themed contest to test and hone data visualization skills by creating an interactive dashboard that answers two key questions: Should you rent or buy in the current U.S. housing market? What are the most appealing geographic locations to rent or buy in the current U.S. housing market?
In addition to launching new educational programs for our people, we’ve also developed a new digital solution platform that will transform the way we do business—Automation on Demand. This platform is a one-stop shop for all automations and accelerators that assist RSM professionals with:

- Daily repetitive tasks
- Client delivery work
- Project management

**Real innovation**

From collaborative ideation and digital training to building advanced technology solutions, RSM is committed to developing an innovative culture to provide value for our clients, colleagues and communities. As the digital world continues to evolve, RSM will lead the middle market with real innovation.

Together we find answers. Together we achieve success. We will deliver real innovation for our clients, real career opportunities for our people and real impact for our communities.
Innovating to create an inclusive culture for all

During the 2021 Innovation Challenge, the third place–winning RSM Spectrum team showcased one of RSM’s core characteristics—caring—by using empathy to imagine a better workplace, inclusive of neurodiverse individuals.

RSM Spectrum is a program to assist in our recruiting, onboarding, interviewing and retention processes through applications that seek to create a community of interest around barriers encountered by employees and recruits needing special accommodations, particularly those with autism. RSM Spectrum offers two mobile–friendly applications to provide candidates and employees with an assistive tool for time management, task management, career management, work–life balance and accommodation requests.

By understanding the challenges and aspirations for neurodiverse individuals and creating spectrum champions across the firm, RSM is building a resilient workforce and equity of access for everyone and enabling an enhanced hiring and onboarding experience for our future talent.

RSM Spectrum takes RSM’s inclusivity efforts to the next level by working with our culture, diversity and inclusion team, and talent and employee network groups to embed these lessons into our processes.
THE POWER OF THE RSM EXPERIENCE

RSM creates compelling experiences for both clients and talent by delivering the power of being understood and inspiring confidence in an uncertain world.

ENHANCING THE RSM EXPERIENCE FOR CLIENTS

As the business world rapidly evolves, RSM is dedicated to helping middle market businesses thrive with support from our powerful, caring culture, depth of insights and first-choice advisor relationships. By bringing a personalized focus to every engagement, we understand our client’s specific challenges and goals and develop collaborative relationships that inspire sustained success.

During the last year, we continued to embrace client feedback in order to empower our relationship leaders to bring the full power of the firm to our clients. This enables us to deliver comprehensive, versatile solutions to clients while expanding our relationships with them. Our relationship with Design-Build Institute of America (DBIA) is one recent example:

“RSM really seemed to be what we were looking for,” said Tracy Powelson, director of administration for DBIA, a nonprofit organization that fosters innovation and collaboration in the construction industry. DBIA initially brought in RSM to perform an assessment of its finance department and ultimately engaged RSM to manage both the organization’s accounting and IT departments. “They felt like part of the team even during our initial interview process. RSM analyzed concepts holistically, made lots of recommendations and really dived in to give us examples of solutions that we hadn't even thought of, which was really great."

We also continue to innovate how we engage with clients and perform services in a hybrid environment. During the last year, we expanded on our client ideation processes and centers to support our clients in evolving their strategies to respond to a changing world. We also built our enterprise client portal platform, which will launch in the second quarter of fiscal 2023, to enable first-choice advisor experiences in a digital environment and make it even easier to do business with RSM in the future.
ENHANCING THE RSM EXPERIENCE FOR OUR TALENT

Caring for colleagues

Driven by our values, we continued to take steps forward on fostering an unrivaled, inclusive culture and talent experience. For example, we were recognized for our caring culture by being named as one of 2021's PEOPLE Companies that Care® by Great Place to Work and PEOPLE magazine as well as one of the 100 Best Companies to Work For® by Fortune.

At RSM, we have always been recognized for our flexibility. Throughout the pandemic, we’ve provided additional flexibility as we worked to manage personal and professional priorities. And flexibility will continue to be ingrained in how we work moving forward. Additionally, we have emphasized the importance of well-being in the workplace and made major investments in wellness programming and support. This includes access to self-directed digital programming, community conversations, one-on-one mental health coaching and clinical therapy for all our employees and their family members.

Empowering new talent

The Pathways program enables college students to learn more about potential internship opportunities, develop relationships with potential future colleagues and get an inside look at RSM.
This year, we shifted our Pathways experience from a local, in-person program to a two-day national, virtual experience prior to spring recruitment season. Our reimagined Pathways program provided exploratory and educational sessions to over 900 students across the United States and Canada. The program included line of business education, opportunities to network with RSM professionals and a chance for students to test their skills during an interactive business simulation and automation challenge.

At RSM, we are always looking for ways to give our people an exceptional talent experience.

We also reimagined the experience for our new campus hires by creating the Starting Your Career At RSM Experience (SY-CARE). We are enhancing our campus hires’ experience by extending their official onboarding period from the technical training weeks focused on education to a 12-month journey that encompasses leadership, advisory and specialized development to create confident first-choice advisors. This elevated experience demonstrates our culture of ongoing development to our campus hires, showing them a mix of education opportunities, exposure to a supportive community of colleagues, on-the-job experiences and an inclusive RSM environment. At RSM, we are always looking for ways to give our people an exceptional talent experience.
Bringing our culture to life

Our culture truly powers our firm. And, while our culture continually evolves, its core never wavers. At RSM, deeper understanding creates deeper impact, through our middle market focus and our dedicated support of the individual. We recognize the true value of devoting time and resources to understand everyone’s skills and passions. While providing our people more hands-on opportunities to make a meaningful impact on clients across a variety of industries, we have established a supportive framework that empowers them to have a deeper impact on their clients, colleagues and communities.

We bring this to life every day, and our most recent Power of Being You video shoot is no exception. Ten of our colleagues shared their honest experiences—reflecting on personal qualities, passions and talents that contribute to their unique impact at work. Now we are telling our story through each of theirs. Clients seek us out, candidates consider us and colleagues stay with us for our unrivaled caring and inclusive culture and the opportunities driven through our commitment—and value—to the middle market.
THE DIGITAL EXPERIENCE

CREATING EXCEPTIONAL RSM EXPERIENCES THROUGH TECHNOLOGY

As we continue rising to the challenge of constant growth and change, we are reimagining what it means to deliver the power of being understood. Through multiyear investments in robust technology tools such as Microsoft Azure, ServiceNow and Workday, we're enabling our teams, actions and insights, and creating the best experiences possible for our clients and people.

Through the digital experience, we are accelerating our unified vision of how we leverage new technologies and existing platforms to unlock the full potential of our teams. This enhances our ability to collaborate and makes it easier to work smarter and deliver on client expectations, both locally and globally.

The digital experience—working for RSM

This year, we launched several new digital initiatives to support the evolving workplace and enable our people to effectively connect and collaborate with each other and our clients, including:

- Enhancing our BYOD—or bring your own device—program by deploying Microsoft 365 and its mobile device management program, enabling greater flexibility to serve clients anytime, anywhere.
- Elevating our collaboration experiences with upgrades to Cisco Webex and expanded pilots of Microsoft Teams.
- Further developing RSM Digital Labs to provide our people and clients with secure and reliable cloud-based environments to safely innovate and test new technologies.
- Launching our modern data platform, built on Microsoft Azure and using PowerBI, to continue enhancing our abilities to leverage data to inform and guide our firm.
- Enhancing our 24/7 virtual support model with enhancements to ServiceNow.
- Embracing emerging technologies through automation and innovation challenges, education programs and hackathons.
- Transforming how we deliver training to support ever-changing client needs.
- Enabling virtual internal conferences and training, virtual recruiting, and supporting the onboarding and talent experience of our virtual interns.
- Strengthening our global support, development and onboarding capabilities for the RSM teams in India and El Salvador, enabling our flexible workforce to quickly scale to serve client needs.

Looking forward, we are enhancing how we enable and serve our people by transforming our finance and human resources systems with Workday, and by launching Microsoft Teams, which will coexist alongside Cisco Webex to provide greater choice in how our people collaborate with each other and clients.

The digital experience—working with RSM

At RSM, we’re enabling our first-choice advisors to redefine how they deliver the power of being understood, bringing digital initiatives across areas of the business together to accelerate how we connect and collaborate with our clients and prospective clients.

By leveraging strategic ecosystems with companies including Microsoft and ServiceNow, we have expanded our client collaboration capabilities with RSM DASH, project management and Team Docs to create an innovative client-centric collaboration and support platform. We’ve also enhanced the digital experience for our people and clients through initiatives like PartnerSight and FamilySight.

New digital enhancements have been introduced to rsmus.com and to our customer relationship management platform. These have enabled increasingly personalized experiences and allow us to respond and pivot to pursue the right opportunities at the right time.

We’re also creating our enterprise client portal, a unified, cloud-based collaboration engine that is personalized and tailored to the unique needs of our people and clients. This solution will be aligned with our digital vision, enabling secure and seamless collaboration across engagement teams, and providing an intuitive, centralized command center for our people and clients.

Our focus on innovation and our investments in emerging technology solutions empower our people with the tools and skills to be productive and creative and best serve our clients.
• Enhancing our BYOD—or bring your own device—program by deploying Microsoft 365 and its mobile device management program, enabling greater flexibility to serve clients anytime, anywhere

• Elevating our collaboration experiences with upgrades to Cisco Webex and expanded pilots of Microsoft Teams

• Further developing RSM Digital Labs to provide our people and clients with secure and reliable cloud-based environments to safely innovate and test new technologies

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RSM FIRST-CHOICE ADVISOR AWARDS

RECOGNIZING OUTSTANDING SERVICE AlIGNED WITH OUR STRATEGY AND VALUES

Fiscal 2022 marked the fifth consecutive year of our First-Choice Advisor Awards. This program is designed to recognize and reward individuals in the firm who have made significant contributions to our clients, our people and our communities throughout the year.

The following RSM professionals were recognized for their outstanding personification of our first-choice advisor culture, strategy and values. Following are highlights from each winner’s nomination:

AND THE WINNERS ARE...

The following RSM professionals were recognized for their outstanding personification of our first-choice advisor culture, strategy and values.

DAVID ADAMS
Senior Manager | Des Moines, Iowa

David brings the power of being understood to life for his clients. He provides exceptional client service and knows how to build lasting, meaningful relationships with clients and peers—with his teams and beyond, including through recruiting. It is clear David cares deeply about people and about the profession.
DAVID BAXTER
Senior associate | Stamford, Connecticut

David is always willing to dedicate his time and effort to RSM employees and clients. He is devoted to training and developing newer team members, receives excellent feedback from clients, and has an active interest in all aspects of the firm. David is a leader among his peers.

MICHELLE FAILLE
Manager | Toronto, Ontario

Michelle is a great critical thinker who challenges the status quo with clients and within RSM. Michelle always delivers quality work, proactively identifies potential roadblocks, and coaches and mentors junior team members. Michelle is a great first-choice advisor, and truly lives our 5Cs and firm values.

MATT GRIFFITH
Senior associate | Wilmington, North Carolina

Matt was an integral part of the RSM team very early in his career. He sees successes with challenging assignments and has become one of the most sought-after team members for projects based on his reputation for being thorough and hard working. Matt loves tackling new challenges and supports his teammates in their development and needs as well.
JENI GUSTAFSON  
Domestic tax matters director | Iowa City, Iowa

Jeni balances a tremendous amount of responsibility for the firm. Many partners throughout the firm have expressed their appreciation of the client-level service she provides. Jeni also supports her team by going out of her way to express her own appreciation. She is also always open to new ideas and new ways of doing things.

ALEXA LAMBERT  
Project management senior associate | Minneapolis, Minnesota

Gianna is committed to excellence and is dedicated to serving her clients. She has designed, developed and implemented multiple processes and procedures that have significantly improved project efficiency, client deliverables and overall capabilities. She contributes significantly to exceptional service delivery. She goes above and beyond in many ways to contribute to the success and strength of her team and

JOE NEWCOMER  
Senior IT advanced customer support technician | Davenport, Iowa

Joe always has a positive attitude along with a strong drive to meet his internal clients’ needs. He is always willing to help wherever he can provide support and always adds value.
LUKE NEWQUIST
Manager | Gaithersburg, Maryland
Luke does everything with excellence. He thrives in, and is energized by, challenging projects. Luke is excellent at communicating about complex topics with clients. He also supports his team through mentoring, training and creating deep connectivity between coworkers.

ADRIAN ROMERO
Manager | Miami, Florida
Adrian is a true trusted advisor at RSM. He is devoted to developing relationships and seeks out expertise across the firm to support his clients. Adrian has become an indispensable resource for our firm and clients. He leans into opportunities and is devoted to guiding clients through their business challenges. Adrian also takes the time to understand his team: what motivates them, how they communicate and what their professional goals are, so he can support their unique talent experiences.

SHELLI SNIDER
Senior administrative assistant | Elkhart, Indiana
Shelli is known for her breadth and depth of wisdom and experience supporting RSM employees and clients. She has a wealth of knowledge and she consistently exceeds expectations. She also does this with a great attitude and with pride in her work.
Responding to the events of recent years has required quick thinking and innovative solutions. Our vision and perspective to understand industry and market shifts have enabled us to develop a vibrant environment that enables success for our clients and employees both now and into the future. By embracing innovation, being agile and remaining dedicated to our purpose, we are leading by example and delivering unparalleled value to the middle market.

THE RSM EXPERIENCE
LEADING THE MIDDLE MARKET
THROUGH TRANSFORMATIONAL TOOLS, SOLUTIONS AND INSIGHTS

Fiscal 2022 marked the fifth consecutive year of our First-Choice Advisor Awards. This program is designed to recognize and reward individuals in the firm who have made significant contributions to our clients, our people and our communities throughout the year.

The following RSM professionals were recognized for their outstanding personification of our first-choice advisor culture, strategy and values. Following are highlights from each winner’s nomination:

ANGELO STANCO
Senior manager | Indianapolis, Indiana

Angelo is sought out by clients for his deep understanding about their businesses and his level of experience. His care for people and quality work is paramount. He is equally sought out by staff for career advice and mentoring.

MELISSA WEISS
Supervisor | Philadelphia, Pennsylvania

Melissa is dedicated to delivering high-quality work through truly understanding her clients’ needs, opportunities, areas of risk and more, all while focusing on building relationships. Melissa is also focused on cultivating strong teams within RSM. She mentors new team members and advocates for new opportunities for her team.
OUR IMPACT

ENABLING CLIENTS TO SUCCEED IN THE CURRENT ENVIRONMENT WHILE PREPARING FOR WHAT’S NEXT

Today’s successful middle market businesses must be nimble—addressing any concerns at hand while being able to pivot quickly to seize opportunities. Through our extensive experience and proven advice, we help our clients understand where they stand and where potential for improvements and growth may exist. These successful experiences help build strong relationships while enabling middle market businesses to thrive.

ADDRESSING NEEDS ACROSS INDUSTRIES
ENHANCING AUDIT DELIVERY
FIRST-CHOICE TAX ADVISORS FOR THE MIDDLE MARKET
ADDRESSING NEW CONSULTING REALITIES
LEADING THE MIDDLE MARKET CONVERSATION
ADDRESSING NEEDS ACROSS INDUSTRIES

DRIVING VALUE WITH OUR INSIGHTS AND PERSPECTIVES
Fiscal 2022 brought more COVID-19 concerns with the onset of the delta and omicron variants. Companies hoped the measures they had taken to survive during the pandemic would be temporary. But what was normal before COVID-19 has changed, possibly for good.

Successfully addressing these changes means companies must be agile and ready to pivot their business model to one that will help them maintain their current workforce, attract top talent, minimize their cyber-risk and increase productivity.

Navigating the new normal
Meeting the needs of the new normal means new investments in technology; if that sounds repetitive, it’s because we’ve been talking more about the implementation of new technology in the last two years than ever before. Technology has always been an issue for businesses, but it has never been so crucial to the future success of companies than it is right now.

Regardless of the industry, or what challenge we’re discussing with our clients, technological innovation is typically at the core of the discussion. The common issues in the marketplace, such as labor shortages, supply chain management, changing consumer preferences and ESG, can all be addressed by helping companies rethink the way they operate. And thinking differently includes transformation through technology.

Looking ahead
In the coming year, RSM will be focused on helping our clients assess their current business models and looking for ways they can stay on top of the ever-changing environment. We look forward to having these conversations and finding solutions that will strengthen our clients' business operations.

The RSM Industry Eminence Program
In May 2022, RSM welcomed the fifth class of industry senior analysts to our Industry Eminence Program. Eleven forward-thinking individuals have begun their journey to expand their industry and sector-based knowledge that they will use in interactions and engagements throughout their career. To date, the program has seen a total of 59 luminaries continue to make their mark across RSM and in the broader marketplace.
Through the Industry Eminence Program, senior analysts also create timely economic insights and perspectives that provide significant value for our clients. Working closely with Chief Economist Joe Brusuelas, Deputy Chief Economist Kevin Depew, and new economists Tuan Nguyen and Tu Nguyen in the United States and Canada respectively, our eminents help middle market companies anticipate and adapt to the rapidly changing dynamics in their specific industries.

Industry insights help Tillamook adapt to rapid change

Tillamook, a large consumer brand known for a wide variety of dairy products ranging from cheese to yogurt, has always considered technology as a core pillar to its success. With the company outgrowing its original infrastructure, placing a burden on both their systems and team, Tillamook embarked on a journey with RSM to implement Microsoft Dynamics 365 as its core systems platform.

RSM helped Tillamook implement a new technology foundation that enables the company to seamlessly adapt to rapid change.

Having gone through this transition pre–COVID–19, Tillamook was able to make quick adjustments when the pandemic hit. The Microsoft cloud platform allowed the company to transition to a remote workforce quickly and enabled it to transform key processes and keep up with the velocity of changing demands the food industry has seen over the past two years.
ENHANCING AUDIT DELIVERY

MAKING A DIFFERENCE IN OUR FIRM, OUR CLIENTS AND THE WORLD

As the middle market continued to experience an accelerated rate of change this past year, RSM has continued to transform our audit capabilities and first-choice advisor value proposition to deliver human insights powered by technology.

The results of our work can be summarized in one word: impact. Our work and continued progress have a tremendous impact on our people, clients and the world every year, and fiscal 2022 was no exception.

Impact on our people

Our talented audit professionals and their insights are vital to the success of RSM's clients and our firm. Along with firm initiatives that strengthen our culture, our audit practice had an impact on the quality of our employees' RSM experience in fiscal 2022 by:

- Accelerating the path to being a first-choice advisor and audit partner by realigning the roles/responsibilities of our senior managers with the industries and complexity of the clients we serve
- Creating capacity to broaden skills through our rotation programs, first-choice advisor curriculum, Industry Eminence Program and other advanced development opportunities
- Balancing workloads and enhancing capacity for higher-value work by increasing hiring at all levels, including interns, campus hires, experienced hires and partners; expanding our capabilities in India; and pursuing other nontraditional resources to add depth and breadth to our capabilities
- Implementing fast-track training and adoption of technology to increase the efficiency of our audits and our ability to deliver quality and value to our clients

Impact on our clients

Clients rely on our professionals to help them understand and respond to business challenges. They also rely on the quality and depth of our audit reports to obtain financing, support dividend and distribution payments, and perform many other analyses that enable their businesses to operate and thrive. We continued to make a significant impact on our clients by:
Delivering thousands of insightful, data-driven audits adapted to our clients' industries and unique business circumstances

Doubling the number and dollar value of the capital market transactions we support by servicing a range of transactions, including initial public offerings, shelf registration statements and multifaceted transactions for special purpose acquisition companies

Leveraging our deep understanding of our clients and their businesses, industries and unique challenges, and applying the right technologies scaled to our clients' specific circumstances

Continuously expanding our innovative ecosystem of technology relationships and advanced digital tools to further streamline our methodology, improve our audit quality and uncover new information

Completing multiple technology pilots that allow us to quickly explore, test and deploy new technologies and tools as part of our focus on audit innovation and continuous improvement

Impact on the middle market
Our work contributed to thousands of clients moving forward and thriving in a rapidly changing world—fueling economies and capital markets, job creation, and the production and delivery of vital products and services around the world.

Every year, our audit practice evolves to increase our relevance and value as first-choice advisors to middle market leaders globally. We are proud of the significant difference RSM’s audit practice has made in fiscal 2022 and look forward to continuing to make an impact in the years ahead.

Delivering value with industry experience, agility and digital velocity

In an ever-changing marketplace, it is vital for middle market companies to work with professionals who understand the complex array of industry, business, financial and accounting challenges they face. RSM’s audit practice recently gained the business of a large real estate investment trust (REIT) because of our reputation as the leader in serving middle market companies, and the quality of RSM’s engagement team and REIT-focused specialists. In addition, the client valued our curiosity to understand the unique aspects of their business, our thoughtful discussion of REITs and other issues that could affect the audit, and our ability to tailor our approach to their unique circumstances. RSM has provided extensive value to the client through a high-quality data-driven audit, customized approaches and value-added industry insights.
FIRST-CHOICE TAX ADVISORS FOR THE MIDDLE MARKET

MEETING CLIENT EXPECTATIONS WITH EXPERIENCE AND TECHNOLOGY LEADS TO GROWTH

RSM tax professionals focused on supporting clients and addressing their evolving needs throughout last year. We continue to build trusted relationships with clients based on our understanding of the challenges they are facing and provide highly relevant and tailored solutions to meet their specific needs. It’s our unrivaled first-choice advisor culture combined with industry and technical knowledge and focus on serving dynamic, growth-oriented companies that have secured our place as the middle market leader for audit, tax and consulting services.

We have positioned ourselves to meet and exceed client expectations by expanding growth, enhancing the RSM experience and energizing services through digital transformation. Whether actively engaging clients with the latest tax policy insights, advancing a tax software solution or investing in our people, RSM remains ready to provide effective tax guidance and services.

Growth

Our knowledgeable and technologically savvy tax professionals are first-choice advisors with industry-specific experience and advice. They listen to their clients to understand their needs, thereby providing solutions that enable consistent, high-quality deliverables and lower client risk. Through collaboration across teams, service lines, industries and lines of business, our team brings insights, service and opportunities for growth. Some examples from the past year include:

- Listening to a family-owned construction prospect’s concerns about family transition led to the inclusion of the firm’s business and transition advisory services team in a proposal. Providing this differentiated experience met their needs and led to a new client for the firm.
- Collaborating with Washington National Tax, a tax functional lead and his team brought added value to an engagement through technical skill and insight that resulted in significant IRS tax penalty savings for the client.
- Leveraging our India team’s co-sourcing tax compliance experience not only reduced work time on a holding company client’s engagement by up to 400 hours but also provided added capacity for the engagement lead to consult with its internal tax team, leading to an amended tax return that yielded millions in savings.
Demonstrating the RSM Experience

An enhanced RSM Experience consists of two dependent parts: our people and our clients. To be a first-choice advisor to the middle market, we remain committed to an inclusive work environment and balanced workday for our people; these create opportunities to learn new skills, grow their professional knowledge and develop fulfilling careers. Our people-focused approach empowers our tax professionals to build strong relationships and provide a differentiated client experience. To help reach this goal, we:

- Optimized work through collaboration with our colleagues in India; implementation of consistent, firm-wide procedures; and adoption of technology and sophisticated digital tools
- Developed our people to become tax functional leaders, aligned through industry and technical knowledge
- Supported enterprise culture, diversity and inclusion efforts by appointing a national leader and forming a tax inclusion committee that, along with our top 100 tax leaders, participated in a diversity assessment to clarify attitudes and reveal areas of opportunity for future development
- Offered RSM tax rotational programs to develop our senior associates and supervisors and help them grow into future leaders of the practice
- Drove thought leadership through our Washington National Tax practice to keep clients informed of emerging tax issues relevant to their business
- Engaged Capitol Hill policymakers on legislative matters important to clients and addressed the potential impact of both proposed (e.g., Build Back Better) and final (e.g., The Infrastructure Investment and Jobs Act) tax legislation on middle market business operations
- Highlighted ideas and insights that help clients move their businesses forward through the RSM Tax Summit—Tax in Motion

Digital transformation

From pencil and paper tax returns to global, virtual meetings, we’ve seen significant changes over the last century in how we work independently and together, and we know the future landscape will have an ever-increasing technology component. In a world where data can be seen as currency, RSM’s technology suite is uniquely positioned to help organizations capitalize on the value of data, shifting the focus from data collation to value-added analytics. To take advantage of innovation, we’ve:
Client service excellence

For tax, Vision 100 ... Powered by our culture means improving the lives of our people and adding value for our clients. We're committed to developing our people to be first-choice advisors and our clients are noticing. For example, a panel of three clients joined RSM's midyear tax leader meeting to give perspective on how we're delivering the RSM client experience. They stressed that RSM tax professionals are not only technically astute but also understand the importance of truly knowing their clients' businesses and industries and bringing our 5 C's, particularly caring, to foster deep relationships.

In one particular 2021 engagement, RSM gained the business and trust of Cypress Creek Partners, where it was clear that our industry knowledge, tax technology capabilities and client service reputation solidified the relationship.

RSM leveraged the innovative PartnerSight platform to help simplify tax compliance for Cypress Creek Partners.
ADDRESSING NEW CONSULTING REALITIES

CREATING COMPELLING CONSULTING EXPERIENCES

Fiscal 2022 saw RSM’s consulting line of business surpass $1 billion in annual revenues as it continued to evolve to create value for clients and employees in a changing environment.

“Collaboration and enterprise perspective are keys to continued growth and addressing new realities,” said Brian Becker, RSM managing partner and CEO-elect. “Now, more than ever before, we need to adapt to our talent and clients’ needs to be compelling.”

Compelling client experiences

In an environment of continued uncertainty—from rapid technological change, a tight labor market and a changing workforce, to new business risks posed by the war in Ukraine and persistent inflation—clients are turning to RSM to help them thrive and evolve their businesses for the future.

While some clients want a laser focus on their specific needs, many want a holistic approach to solving their problems. RSM provides both through an experience tailored to the client.

In fiscal 2022, we expanded our ability to provide holistic service by embracing industry and collaborating across functions and solution sets to increase our relevance and harness the full power of RSM to benefit our clients. We also continued to build our enterprise account leader program to provide clients with broad needs across multiple consulting functions and RSM lines of business with dedicated leaders to enable seamless client service and growth.

Clients who want holistic solutions are increasingly turning to RSM’s managed services for their technology, risk, finance and other business needs. This approach enables access to best-in-class tools and experienced resources to navigate today’s changing business environment, enabling clients to maintain sound operations in times of uncertainty.

“The number of managed services client engagements in fiscal 2022 alone is a testament to how adaptive we have been already,” said Pat Vance, RSM consulting leader. “We made significant progress in this vast landscape of opportunity and we’re only getting started. If we can incorporate managed services into our client deliveries, it will help us deepen those relationships and bring significant value while simultaneously growing the consulting practice.”
In fiscal 2022, consulting also enhanced its service offerings both organically and through two acquisitions that expanded our ability to provide nonprofit technology solutions and digital transformation through ServiceNow.

**Compelling talent experiences**

In an environment of virtual work, remote meetings, hybrid schedules and expanded global collaboration, RSM's consulting teams adapted to new ways of working. We have invested heavily in recruiting, onboarding and talent development strategies to enhance the experiences for our people and help them serve our clients effectively, which has resulted in retention rates above the market trend.

In fiscal 2022, we continued to evolve our learning and development approaches to bolster the execution of our strategy. From immersive technical boot camps to industry knowledge to project management and first-choice advisor skills, we are building the skills of our professionals to meet our clients’ changing needs while enhancing the career paths of our people.

In the face of a tight labor market in the United States and the need for new skill sets, we also greatly expanded our talent in India and El Salvador. This provides our teams with highly skilled resources that bring new insights and capabilities while enabling work to be done seamlessly over a 24-hour day. Our global teams are learning to operate collaboratively, improving both client and talent experiences.

We are also accelerating our efforts to provide an inclusive culture and talent experience to attract and retain the best, the brightest and the most diverse workforce. We continue to provide support, flexibility and enriching experiences so that our people are compelled to bring their best
Winning with industry, agility and digital velocity

RSM’s technical accounting consulting team harnessed the power of RSM to help a hospitality client form a real estate investment trust and consolidate the financial statements of 77 properties while converting them from a tax basis to GAAP. This 10,000-hour project involved 102 team members from across various RSM lines of business and our office in India. RSM’s audit team brought insight into the real estate industry, the TAC team delivered technical accounting knowledge, and the team in India helped to analyze and review massive amounts of data. Together, the U.S. and India teams worked 24 hours a day to meet the project’s aggressive deadline and deliver economic and business value to the client.

WINNING WITH INDUSTRY, AGILITY AND DIGITAL VELOCITY:

10,000 HOURS
102 TEAM MEMBERS
77 PROPERTIES
24 HOUR WORKDAY
LEADING THE MIDDLE MARKET CONVERSATION

DELIVERING TIMELY, TRUSTED INSIGHTS INTO CRITICAL BUSINESS ISSUES

As the COVID-19 pandemic unfolded, RSM unpacked the complex impact of the virus on middle market businesses with a steady cadence of thought leadership around issues ranging from supply chain to inflation, price volatility and labor.

The proprietary RSM US Middle Market Business Index, which measures business sentiment at midsize companies, celebrated its five-year anniversary in May 2021. In addition to the regular MMBI quarterly report featuring perspectives from Chief Economist Joe Brusuelas, RSM rolled out MMBI special reports on cybersecurity, environmental, social and governance issues, infrastructure and the changing workplace, all topics gaining focus in the business community.

Plans to launch a U.K. version of the MMBI in 2022 were solidified; its inaugural March issue helped to cement the firm’s growing global influence on middle market issues.

Read the full reports here:
Economists Tuan Nguyen (United States) and Tu Nguyen (Canada) joined the firm’s economics team in 2021, boosting coverage in The Real Economy, RSM’s monthly economic publication, and The Real Economy Blog, which provides a steady stream of daily insights on market-driven trends. Their efforts, along with an expanding cohort of trained economic analysts in the Industry Eminence Program led by Deputy Chief Economist Kevin Depew, led to higher engagement with clients, media and other middle market stakeholders. The announcement of 11 new senior analysts from the United States, U.K. and Canada in RSM’s Industry Eminence Program in early 2022 marked the program’s fifth year, bringing the total number of analysts trained to 59.

The analyst’s data-driven perspectives were featured in the firm’s quarterly Real Economy Industry Outlook reports, in media coverage and in the growing inventory of articles under their bylines in third-party publications, boosting awareness with internal stakeholders, clients and prospects as they helped shape the firm’s position on key issues affecting their industries.

Throughout 2021, as the Biden administration and Washington lawmakers debated a host of legislative and regulatory issues, RSM’s public policy team brought middle market perspective to the virtual halls of Congress and the policymaking community. Direct engagement by the firm’s leaders with lawmakers on emerging legislation around infrastructure, COVID-19 relief and tax reform, as well as important issues such as health care and cybersecurity, fostered improved understanding in Washington of the distinct challenges facing midsize businesses. RSM also shared these insights internally and with clients through several channels, including thought leadership, webcasts, the firm’s RSM Power platform and other timely communications.

In addition, the firm’s long-term partnership with the U.S. Chamber of Commerce, underscored by its joint publication of the MMBI, was strengthened by an ongoing series of quarterly webcasts on the middle market economy that featured Joe Brusuelas and Neal Bradley, the chamber’s executive vice president and chief policy officer.

Joe frequently appears in the business media, including CNN, The New York Times and The Wall Street Journal, where he serves on the publication’s economic forecasting panel. He was also recently named a member of the forecast board of advisors at the UCLA Anderson School of Management.

In the background, the firm’s robust new website platform was being developed throughout the year. Its March launch greatly improved RSM’s ability to enhance middle market storytelling with a fresh look and greater interactivity.
OUR STEWARDSHIP

FOSTERING AN UNRIValed CULTURE OF CARING, INCLUSIVITY AND LEADERSHIP

Investments in our communities are pivotal to our success and diverse experiences make us stronger. Flexibility is at the core of life at RSM as employees are encouraged to pursue their personal passions while also being successful in their work.

ACTING AS TRUSTED STEWARDS OF OUR COMMUNITIES

EXPANDING THE IMPACT OF DIVERSITY AND INCLUSION

PURSUE YOUR PASSION

OUR ENVIRONMENTAL COMMITMENT
In 2014, we established the RSM US Foundation to enhance the giving that was already happening in our offices across the country. A tax-exempt public charity, our foundation is dedicated to building tomorrow’s middle market leaders. In fiscal 2022, our people continued to give back to our local communities through existing programs that provide support to organizations committed to creating stable environments for youth and enhancing educational outcomes.

Here are some stewardship highlights from fiscal 2022:

- Through inventive fundraising activities, firm funding, strong partner and employee participation, and financial support from the RSM US Foundation, we donated a record-breaking $4.8 million through our Birdies Fore Love program. These funds benefitted 75 local nonprofit organizations.

RSM employees raised a record $4.8 million for local nonprofit organizations during last year’s Birdies Fore Love campaign.

- For RSM’s 2021 Volunteer Week, more than 4,000 of our people, their families and friends participated in more than 100 volunteer events across the United States and Canada, supporting 91 charitable organizations. Dollars for Doers, an RSM US Foundation program, buoyed volunteers’ time with grants to extend our impact.
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• In July 2021, we announced our support of Boys & Girls Clubs of America’s mission with a $200,000 donation, through the RSM US Foundation, to help implement the nonprofit’s workforce readiness strategy to help young people build the skills they need to succeed after high school. Pilot programs in Chicago; Orlando, Florida; Washington, D.C.; and Irvine, California, began in the fall.

• The RSM US Foundation committed $100,000 to Active Minds in 2021 as well as an additional $100,000 per year in 2022 and 2023. This gift continues RSM’s support of Active Minds’ mission to end the silence and change the conversation around mental health for everyone.

• Committed to building the next generation of business professionals, RSM and our foundation continued support of colleges and universities through grants and scholarships, donating $1,226,982 to more than 60 higher education institutions.

• In addition to Power Your Education (U.S. and Canada), RSM Power of Inclusion and First Generation scholarships, the RSM US Foundation expanded its impact to students pursuing higher education by launching the RSM Community College Accounting Scholarship. The scholarship, previously supporting one school, is set to launch nationally in early 2022.

Be sure to check out the 2021 RSM US Foundation Giving Report to learn more about our stewardship impact.
EXPANDING THE IMPACT OF DIVERSITY AND INCLUSION

Every day since our firm was founded in 1926, we have had a focus on our people—we understand that they are what make us successful. Over our nearly 100-year history of meeting the needs of our clients, our communities and our people, RSM has embraced the power of being understood, and today we seek to increase diversity, equity and inclusion—within our firm, within our profession and within the communities we serve.

This means we make intentional choices to create an environment where diversity and inclusion thrive, because we understand that the innovative solutions we all need to succeed come through diversity of thinking. And diverse thinking happens when we bring our unique perspectives, insights, experiences and talents to the table.

At RSM, we have created and continue to sustain an environment of inclusion for all. As our Evolving Mosaic demonstrates, we embrace that people and experience shape our progress and while there is much work ahead of us, this year we received numerous third-party endorsements for our efforts and various recognitions for how inclusion is making a difference at RSM. Examples include being named as a Fortune 100 Best Companies to Work For®, being named by Seramount (formerly Working Mother Media) as one of its Best Companies for Dads and one of its 100 Best Companies overall, and by being among the Best Places to Work for Disability Inclusion by Disability Equality Index.

We continue to take proactive steps to ensure that our commitment to inclusion is integrated into business and sustainability moving forward. For example, over the past year, we joined more than 80 other organizations in signing Disability: IN’s CEO Letter on Disability Inclusion. We also launched the Middle Market Collaborative for Understanding, a group of middle market business leaders that comes together regularly to enhance diversity, equity and inclusion.
In addition to our full-time team dedicated to culture, diversity and inclusion, our 12 employee-led employee network groups (ENGs) play a key role in fostering an inclusive workplace culture and proactively addressing issues important to our people. For example, for a number of years, we've honored Dr. Martin Luther King Jr.’s commitment to service through our annual Season of Service, led by our national African American and Canadian Excellence (AACE) ENG. This past year, we raised $54,878 through cash donations and had nearly 332 volunteers donate more than 780 hours of their time.

Our ENGs were also highlighted in a series of “Inclusion Starts with I!” videos where our managing partner and CEO engaged in question-and-answer sessions with our national group leaders and members. Our CEO also holds a quarterly CEO Courageous Conversation, inviting direct and open communication between our workforce and leadership in candid, inclusive conversations.

Our investment in the diverse workplace of the future through scholarship support for students from underrepresented populations is helping to ensure our ongoing success by supporting the RSM US Foundation’s mission of building tomorrow’s middle market leaders. This year, we also launched the RSM Excellence Academy, a multiyear, multifaceted early identification professional development and skill-building program for college students majoring in accounting, business technology and related fields. The academy teaches students about careers in professional services and introduces them to RSM’s workplace culture.

At RSM, we remain committed to our journey toward greater equity and inclusion in our society as evidenced by our CDI activities, our racial understanding task force, our CEO Action Fellows for Racial Equity and more.

Learn more about diversity, equity and inclusion at RSM here.
PURSUE YOUR PASSION

GIVING OUR PEOPLE THE RESOURCES TO ACHIEVE THEIR DREAMS

Since 2016, many of our people have seized the opportunity to submit their creative and unique applications to RSM’s Pursue Your Passion program. Each applicant shared their dream for a chance at $10,000 plus additional time off to pursue a passion project they might not otherwise be able to realize. Meet our 2021 winners and learn more about their inspiring dreams.

INSPIRING DREAMS...
Meet our winners and learn more.

SUSAN BIRKE
Senior scheduler | San Antonio, Texas

Susan will improve facilities at Charming Pet Rescue and create better living conditions for rescue animals.

VALENTINA DERIABINA
Tax supervisor | North American Service Center

Valentina will continue her support of Helping Village Libraries of the Russian North by sending books to libraries in rural villages in Russia.
Investments in our communities are pivotal to our success and diverse experiences make us stronger. Flexibility is at the core of life at RSM as employees are encouraged to pursue their personal passions while also being successful in their work.

**OUR STEWARDSHIP**

**FOSTERING AN UNRIVALLED CULTURE OF CARING, INCLUSIVITY AND LEADERSHIP**

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**LESLIE HAMPTON**
Office administrator | Oklahoma City, Oklahoma

Leslie will travel across the country pursuing her geocaching (a type of global treasure hunt) passion with her daughter.

**JEREMY HARTY**
Assurance senior associate | Calgary, Alberta

Jeremy will follow his dreams of curling, using the funds and additional days off to support his goals and his team.

**SHELLY LEALOS–YATES**
Business applications Oracle NetSuite supervisor | San Francisco, California

Shelly will help women become happy and whole again by expanding her nonprofit organization which supports those who have been in abusive relationships.
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**CASEY MCGUIRE**

Innovation senior associate | Minneapolis, Minnesota

In honor of her friend, Cassie, Casey will fund her Susan G. Komen three-day team to walk in San Diego this November.

**ECHA ODEH**

Financial consulting restructuring and recovery senior associate | Toronto, Ontario

Echa will support a medical clinic in Agidegbe, Nigeria, by installing solar power.

**MISTY PLEINESS**

Technology risk consulting IT risk director | Detroit, Michigan

Misty will open a therapeutic horse care and riding program for children, young adults and veterans with physical and mental disabilities.
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BRADLEY SAWYER
Business valuation senior associate | Gaithersburg, Maryland

Bradley will pursue his dreams by making a summit attempt on Mount Rainer.
OUR ENVIRONMENTAL COMMITMENT

DEDICATED TO RUNNING OUR BUSINESS IN A WAY THAT HAS A POSITIVE IMPACT ON THE ENVIRONMENT

RSM is committed to enhancing sustainability within our organization and in our communities by reducing waste, electricity usage and greenhouse gas emissions, and inspiring others to do the same.

In fiscal 2022, RSM increased our focus on environmental sustainability. We completed a baseline environmental impact analysis, formed an employee engagement committee and established an environmental advisory board.

On Earth Day, the employee engagement committee hosted our inaugural RSM Trash Dash where employees raced together to clean up trash in their local communities.

As we look ahead to fiscal 2023 and beyond, we are working to formalize our environmental objectives, metrics, key performance indicators and reporting practices to ultimately continue to better our firm, our people, our communities and our planet.