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FORUM|W ANNUAL REPORT

MOSS ADAMS_{LLP}
Certified Public Accountants | Business Consultants

SETTING A COURSE

CREATING MOMENTUM

Forum W remains a top priority for our firm, and we continue to keep its mission at the forefront of our minds: to accelerate the firm's success in attracting, developing, retaining, and advancing talented women at Moss Adams. Seven years in, we can see that we're making an impact.

In 2015, we focused on women's development and advancement, finding ways to make career and leadership development opportunities available at each level so we can strengthen our pipeline and increase the number of women partners and leaders at the firm.

To accomplish these goals, we've developed a sponsorship program to increase the individual impact. We've also begun to create the framework for a process that will more intentionally identify candidates and fill leadership roles with women. The momentum is exciting, and this year's report demonstrates it. We invite you to learn more—about what we've done, where we're going, and what we've yet to do.



Chris Schmidt
Chairman and CEO



Dick Fohn
President and COO



Jen Wyne
Director of HR

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WHAT WE'RE ABOUT

OUR MISSION

To accelerate the firm's success in attracting, developing, retaining, and advancing talented women.

OUR PRIORITIES

Individual Impact

Encourage women to take ownership of their career, and create practical ways partners can engage in women's development and advancement.

Policies and Processes

Create a more intentional process to identify candidates and fill leadership roles.

Renewed Focus

Refresh and reinforce the business case for Forum W.

Reputational Growth

Use external events and recognition to expand Forum W's impact in the marketplace.

OUR GOALS



Foster an inclusive culture that values and leverages our women's talents, voices, and ideas.



Make career and leadership development opportunities available at each level to strengthen our pipeline of women.



Increase the number of women partners and women in leadership roles.



Be known as a thought leader on developing and advancing women.

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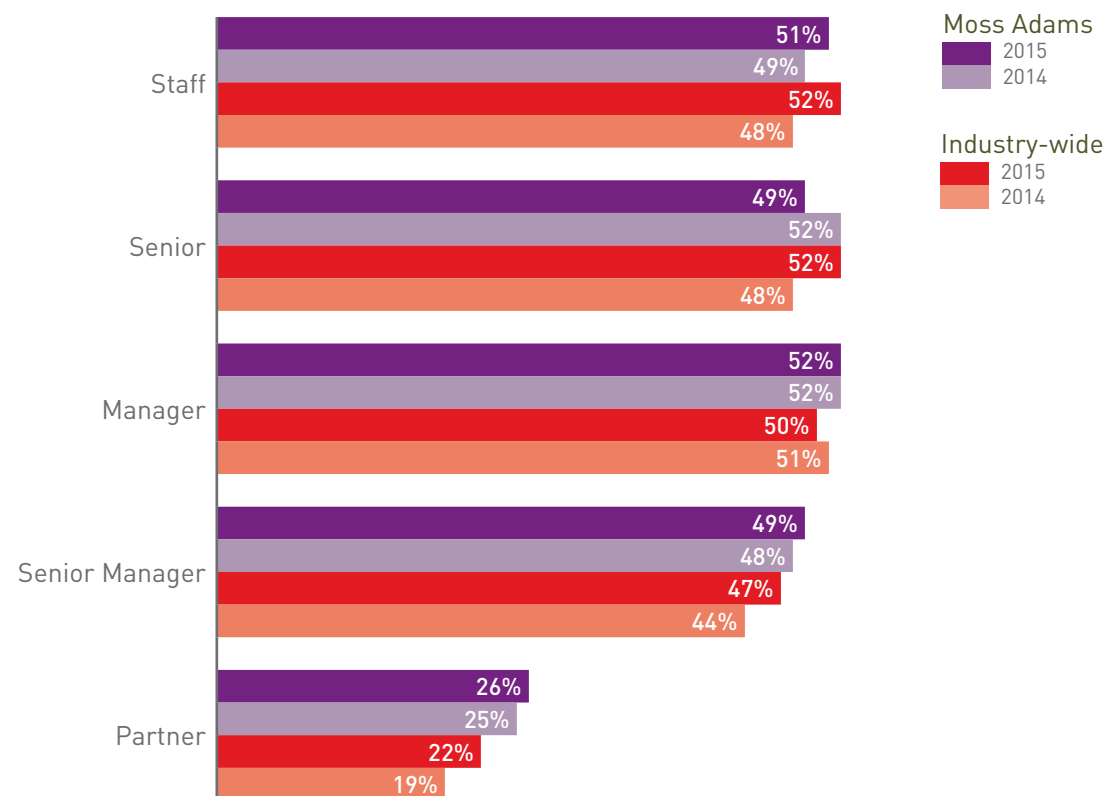


NOTABLE NUMBERS

AN INDUSTRY IN MOTION

As an industry, we may have a long way to go, but we're proud to say we're seeing progress in the number of women who become partners.

In 2009, 20 percent of partners at our firm were women. Today, that number is 26 percent—4 percent above the industry standard. Even better news? The industry itself is improving, with the percentage of women partners up 3 percent from last year.



Moss Adams 2014 data as of July 31, 2014; 2015 data as of June 30, 2015.
Industry-wide data from the [2015 Accounting Move Project Report](#).

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TALENT AND TURNOVER

As of year-end 2014, more than half of our experienced hires—

52%
—were women.

There's room to improve. Turnover is an important measure of how our people feel about their work at Moss Adams, the way they're rewarded, and the satisfaction they get from what they do. But it's also an important factor in our talent pipeline.

Compared with 2013, we saw higher turnover among women in all positions, an indicator that we need to do more to help women find long-term success here rather than somewhere else.

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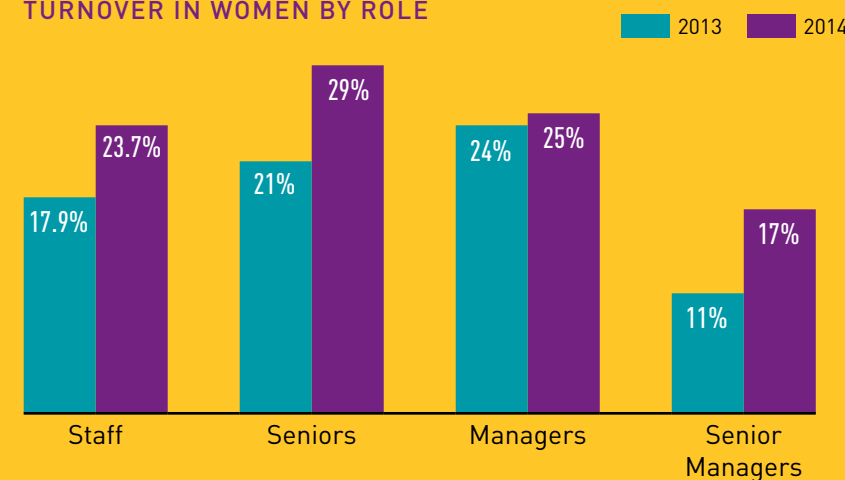
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TURNOVER IN WOMEN BY ROLE



Data for 2013 as of December 31, 2013; data for 2014 as of December 31, 2014.



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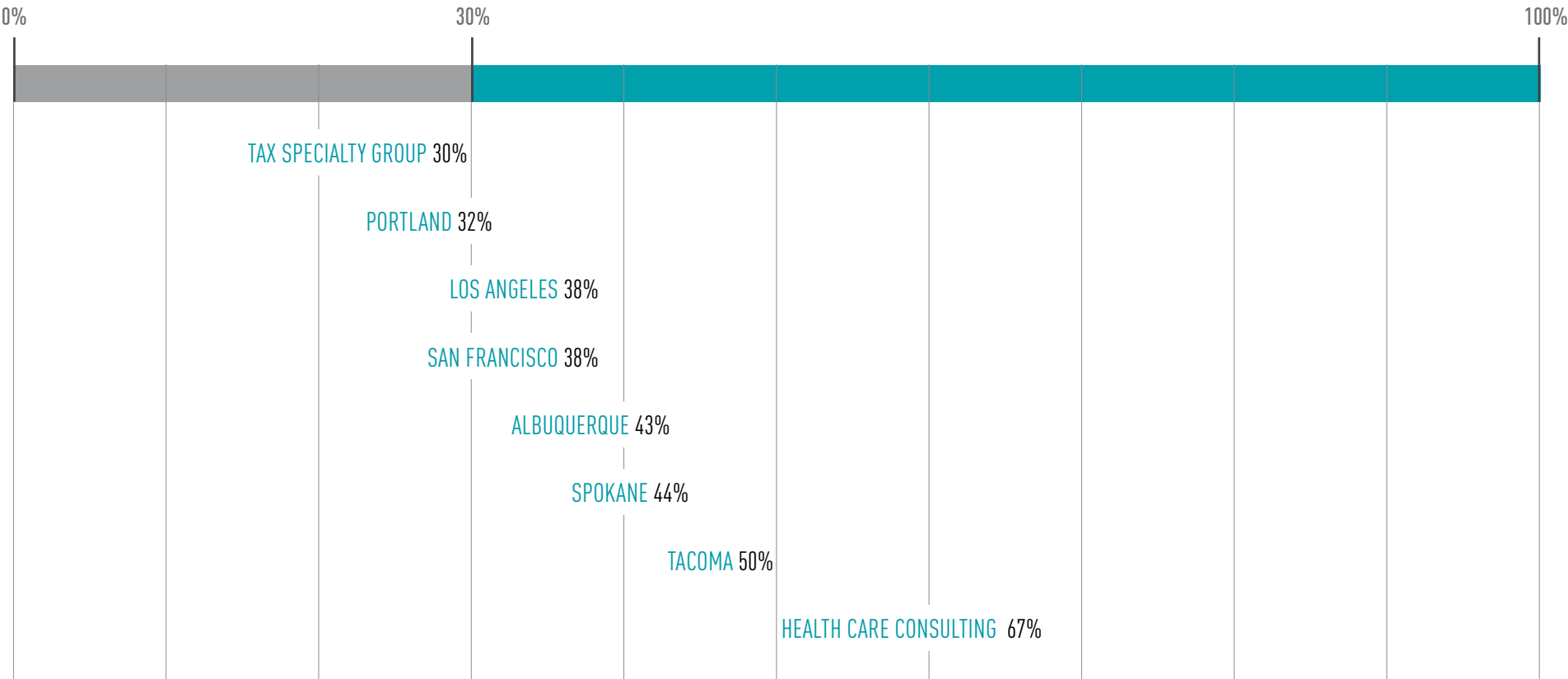
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HITTING OUR GOALS

PERCENTAGE OF PARTNERS WHO ARE WOMEN



As of this year,

**8 offices
or groups**

have achieved our firm-wide goal to bring the percentage of partners who are women up to at least 30 percent.

NOTABLE NUMBERS

WHAT MOSS ADAMS WOMEN ARE SAYING

81%

*"Moss Adams
demonstrates a clear
commitment to creating
a diverse and inclusive
workplace."*

87%

*"This is a great
place to work
(as a firm)."*

79%

*"I have the flexibility
in my job to manage
responsibilities at work
and outside of work."*

91%

*"I'm proud to
say I work for
Moss Adams."*

76%

*"Overall, I would
say this is a
great place to build
my career."*

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INNOVATING FOR IMPACT

DRIVING ENGAGEMENT

GROWTH SERIES

In 2016, we'll launch this latest initiative in our efforts to strengthen our pipeline of women partners. It's a leadership program for high-potential women senior managers. Vendors, third-party speakers, and others elements are now being evaluated and incorporated into the program design.

Objectives

- Inspire and motivate women to become partners in the firm
- Clarify the line of sight to partner
- Supplement technical skills with business acumen and leadership skills
- Develop camaraderie and a network among women across the firm
- Address unique issues women face in our leadership equation

Components

- Leadership assessment
- Individual executive coaching
- Peer coaching groups
- Leadership skills clinics
- Alignment with a sponsor

PATH TO PARTNER

In 2014, we launched an awareness program surrounding the path to partnership and published a guideline document and preparation tool to use as a roadmap. Since then, we've conducted workshops across our offices that:

- Allowed partners to share their individual stories and discuss how employees can achieve their goals of making partner
- Fostered transparency regarding the path to partner
- Created an opportunity to ask questions and explore what this path will look like for each individual.
- Paved the way for a 2016 sponsorship initiative

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INNOVATING FOR IMPACT

IMPROVING ACCOUNTABILITY

FORUM W FOR LEADERS SERIES

Sponsorship has been one of our focus areas for 2015 and will continue to be critical in 2016. This series aims to give partners practical and easy ways to engage in Forum W, offering education and tips that support their sponsorship goals. Our progress so far:

- **Added sponsorship to scorecards.** Partners identified individuals to sponsor in 2015, tracking their progress through mid-year and year-end status updates. This emphasizes the importance of active sponsorship and increases awareness and accountability.
- **Created the Sponsorship 101 guide.** Once partners selected individuals to sponsor, this reference helps them navigate the new measurement criteria.
- **Planned for further development.** We'll continue to build this series in 2015 by creating additional tools and resources, including an FAQ, business case, webinars, articles, and videos.

LEADERSHIP OPPORTUNITY FRAMEWORK

We've made further progress on creating a framework for advancement. Here's what's we have on the books so far:



Goal

To make the decision criteria more transparent



What It Covers

- How we identify and select successors
- How we vet candidates for positions
- How we appoint leadership roles



Scope of Use

Firm-wide, regionally, and by office

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2015 HAPPENINGS

A FEW NOTABLE EVENTS

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WHO

WHAT

ALBUQUERQUE	PORTLAND	CALIFORNIA CENTRAL VALLEY	SEATTLE	SOUTHERN CALIFORNIA AND PHOENIX	
<p>For girls ages 9 through 16</p> <p>Conducted in partnership with the Boys & Girls Clubs of Central New Mexico and the New Mexico Department of Workforce Solutions</p>	<p>Moss Adams seniors and staff, each accompanied by a partner or senior manager</p> <p>Conducted in partnership with law firm Tonkon Torp LLP</p>	<p>Moss Adams professionals at all levels</p>	<p>Senior leaders from Moss Adams and participating organizations</p> <p>Cosponsored with Alaska Airlines, Davis Wright Tremaine LLP, and Liberty Mutual Insurance</p>	<p>Groups of eight to 15 Moss Adams women</p>	<p>New moms and new dads working at Moss Adams</p>
<p>Career fair and life-skills training session featuring:</p> <ul style="list-style-type: none"> • Training on résumé preparation, dressing for a job, interviewing, community service, and social media awareness • Mock interview stations, presentation sessions 	<p>Charitable networking event with legal peers; assembled bags of necessities to benefit Salvation Army Female Emergency Shelter</p>	<p>A path-to-partner luncheon series that:</p> <ul style="list-style-type: none"> • Has partners share the ups and downs of their personal journeys • Creates a forum for open communication, fostering morale and a sense of community • Demystifies the path to partner 	<p>The Forum on Engaging Men, Advancing Women:</p> <ul style="list-style-type: none"> • Teaches gender-savvy leadership skills • Examines the impact of gender on customer and client relationships • Fosters advanced dialogue among senior leaders 	<p>Intimate gatherings at the home of a partner or senior manager where women build rapport with one another through fun, themed activities</p>	<p>Back-to-work care packages, including:</p> <ul style="list-style-type: none"> • A two-year subscription to <i>Parents Magazine</i> • Information on Bright Horizons and Aetna info for new parents • Tips on transitioning back to work • A gift card for a massage



GETTING NOTICED

NATIONAL RECOGNITION



Best Public Accounting Firms for Women
—Accounting MOVE Project

Top Companies for Executive Women
—National Association for Female Executives



100 Best Companies
—Working Mother

Innovation in Diversity—Award of Excellence
—Profiles in Diversity

100 Best Adoption-Friendly Workplaces
—Dave Thomas Foundation for Adoption



CREATING MOVEMENT

2015: 5TH ANNUAL ACCOUNTING MOVE REPORT

This national study provides insight on women in the accounting profession by measuring four factors essential to women's advancement:

Money

Opportunities

Vital work-life resources

Entrepreneurship

As a founding member of the project, we continue to play a role in the report, providing our profession with greater access to the drivers of retention and advancement of women in public accounting.

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TONE AT THE TOP



We'd like to extend special recognition to our chairman and CEO, who's also making an impact on our profession.

CHRIS SCHMIDT

AICPA Women's Initiatives Executive Committee

GETTING NOTICED

SELECTED COMMUNITY & PROFESSIONAL LEADERS

Many women throughout our firm are involved in their local communities. Here's a sampling of a few of those notable women who are making an impact.

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VALERIE ALLEN

11th Annual Women of Influence Awards, *Albuquerque Business First*



CHERI BURNHAM

14th Annual Women Worth Watching Award, *Profiles in Diversity Journal*



ANGIE FIDLER

Board Member, Finance Committee
Chair, Excel Public Charter School
Board Member, Leave 10



EMILY GRAY

Emerging Leaders Committee,
United Way of Lane County



DENA HERBOLICH

Chair, 2016 WSCPA Women's Leadership Summit
Vice Co-chair, 2015 and 2016 AICPA Employee Benefit Plan Conferences



BERTHA MINNIHAN

2015 CalCPA Women to Watch Award



AMY SUTHERLAND

Board of Examiners, AICPA CPA Exam
Chair, AICPA CPA Exam Content Committee



LAURIE TISH

Member, AICPA Professional Ethics Executive Committee
Executive Committee Member, Board Member, National Association of State Boards of Accountancy Conferences



FRANCINE VORHEES

Bridge Builder Award, Sacramento Regional Community Foundation
Women of Distinction Award, JD RF
Treasurer, JD RF Northern California Inland Chapter
Board Member, Sacramento Philanthropic Advisory Forum



WENLI WANG

2015 Most Influential Women in the Bay Area, *San Francisco Business Times*

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FORUM W LEADERSHIP AWARDS

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PAUL TUCCI
PARTNER,
SANTA ROSA

A highly active career advisor and sponsor, Paul consistently challenges his peers' thinking, advocating for women's advancement and success at Moss Adams. He founded a reading club where members read and discuss educational and empowering books on reaching their full career potential.



ANIA KROL
MARKETING MANAGER,
SEATTLE

Ania has committed countless hours to acting as a liason for Forum W, promoting an inclusive culture throughout the Seattle complex and the Puget Sound region. She played a key role in the launch of empoWer, our women's networking alliance with Davis Wright Tremaine LLP and US Bank, and oversees its one-on-one networking program.



MANG FANG
SENIOR MANAGER,
CALIFORNIA CENTRAL VALLEY

Upon her reappointment as an office champion, Mang reignited her office's Forum W efforts by driving a significant number of the 15 events held in 2014 and 2015. She works as a liason between employees and partners to unify Forum W's message and mission.



RESOURCES

MAKE YOUR IMPACT

Visit www.mossadams.com/forumforwomen to find resources including:

- Our previous annual reports
- Our Path to Success series, which addresses Forum W's priorities of mentoring, networking, and community service
- *Link by Link: A Guide to Forming a Women's Network at Your Organization*

Link by Link is an easy-to-use resource that can help you get started. We've learned a lot since launching Forum W, and we're excited to share our strategy and experiences to help other organizations get a jump-start on creating more opportunities for women to advance their careers.

FORUM W ADVISORY BOARD

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Jeff Dieleman
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Francine Vorhees
Tricia Bencich
Jen Wyne

ABOUT MOSS ADAMS

Nationwide, Moss Adams and its affiliates provide insight and expertise integral to your success.

Moss Adams LLP is a national leader in assurance, tax, consulting, risk management, transaction, and private client services.

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WWW.MOSSADAMSWEALTHADVISORS.COM

Moss Adams Capital LLC offers strategic advisory and investment banking services, helping you create greater value in your business.

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