



THE **POWER** OF PROGRESS

RSM US LLP Fiscal Year 2024
Impact Report



Instilling confidence in a world of change

Our world is changing rapidly—from new innovations that drive positive change to disruptions that create the need to embrace new business and talent strategies. RSM is dedicated to supporting the success of our clients, people and communities through timely insight, effective solutions and essential support to help anticipate and address challenges and capitalize on opportunities.

We are proud to present our Fiscal Year 2023 Impact Report, which provides a comprehensive look into our business and key programs over the last year. In it, you'll learn more about our work to strengthen the services we provide, enhance diversity within our firm (and beyond), deliver leadership in the places we live, and demonstrate our commitment to protecting the environment. As a firm, everything we do is centered on instilling confidence in a world of change.

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Letter from **Brian Becker**



Dear clients, colleagues and friends,

The power of progress is a fitting title for RSM's fiscal 2024 Impact Report. We have made significant progress during the last year in our journey to become an even more compelling, digital and global organization committed to leading the middle market into the future.

To enhance our ability to be compelling to our clients and to our people, we took a bold step last year to align our audit and tax lines of business around service lines, capabilities and solution sets. While geography still plays a crucial role in how we serve our clients, this change enables us to develop deeper technical and industry expertise while scaling for the future. It benefits our people by aligning them with others who do similar work across the country and around the world—enabling them to accelerate their learning and development while providing services with quality and due professional care. And it benefits our clients by providing seamless access to the full power of all RSM has to offer.

New digital solutions continue to empower our people and our clients. Last year's implementation of a new enterprise resource planning (ERP) system is helping us harness data and information in powerful ways while increasing efficiency for our people and our clients. AI tools are enabling our professionals in their work as we simultaneously develop solutions for our clients' businesses. And MyRSM is serving as our new, integrated client portal that provides a single point for clients to work seamlessly together with their RSM professionals. Finally, for our clients who need even more support to become digital, we are continuing to build and refine our full suite of outsourced solutions with some exciting announcements planned in the year ahead.



“I have never been more excited about RSM's future than I am today.”

– BRIAN BECKER, RSM US LLP MANAGING PARTNER & CEO

On the global front, we continue to expand our abilities to serve clients wherever in the world they operate as we execute on our global 2030 strategy, which was introduced in 2023. To better reflect that strategy, we modernized our global brand with new visuals and reenergized messaging designed to reflect RSM's purpose—to instill confidence in a world of change. Finally, we were pleased that E.J. Nedder, who most recently served as our RSM US Chief Strategy Officer, was selected as the new global CEO effective June 1, 2024.

Through it all, we have maintained a steadfast commitment to our values and the 5 C's. Our people have honored us by once again earning placements on the Fortune Best Companies to Work For and People's Companies that Care lists, and we were pleased to earn a bronze medal from EcoVadis for our efforts around sustainability and inclusion. We were also thrilled to raise \$5.7 million to support children and families in the communities where we live and work through our annual Power of Love campaign.

I have never been more excited about RSM's future than I am today. I invite you to read more about the power of our progress as we strive to be the first-choice advisor to our clients and build an unrivaled, inclusive culture for our people.

With gratitude,

A handwritten signature in black ink, appearing to read 'Brian'.

Brian Becker, RSM US LLP Managing Partner & CEO

Letter from **Brandon Rucker**



Dear clients, colleagues and friends,

The RSM US LLP Board of Directors is pleased to present our 2024 Impact Report: The power of progress. It is a reflection of RSM's significant achievements during the last fiscal year.

Every action we take is intentional to support RSM's evolution to be the most compelling, digital and global organization serving middle market leaders around the world. The last year has been one of incredible progress and change both within our firm and in the world around us. RSM's purpose is to instill confidence in a world of change, and this report does so by highlighting some of our most important developments. But what I want to focus on here are a few things that remain steadfast.

First, our values are the bedrock of our organization. Respect and uncompromising integrity, succeeding together, excellence in all we do, impactful innovation and stewardship guide our day-to-day actions and serve as our North Star as we build strategies for the future. They have endured and guided our success for nearly 100 years, and I am confident they will sustain us through any changes that come our way.

The values are supported by our 5 C's, which are the behaviors that guide us as we deliver the power of being understood to our clients and each other. By being caring, curious, collaborative, courageous, critical thinkers, RSM helps instill confidence in our people and our clients as we navigate the rapidly evolving business landscape.



“Every action we take is intentional to support RSM's evolution to be the most compelling, digital and global organization serving middle market leaders around the world.”

– BRANDON RUCKER, CHAIR OF THE RSM US LLP BOARD OF DIRECTORS

As we pursue our new digital and global future, we do so with a constant focus on quality and due professional care. Our clients and the public expect that from us. Quality is foundational in all our business decisions.

In a rapidly changing world where RSM is evolving rapidly, it is more important than ever that we remain grounded. Our values, 5 C's and commitment to quality provide that grounding. They guide our board, our leadership, our firm and our people every day as we instill confidence in a world of change.

Sincerely,

A handwritten signature in black ink that reads "Brandon". The signature is written in a cursive, slightly stylized font.

Brandon Rucker, Chair of the RSM US LLP Board of Directors

On behalf of the RSM US LLP Board of Directors

Paul Guirovich (chair), Brian Becker, John Bird, Jamie Burgess, Christina Churchill,

RSM's Commitment to responsible business



RSM's focus on operating ethically continues

At RSM, we are committed to delivering long-term value for stakeholders by maximizing our positive impact on society and the environment. We are also committed to sharing progress on our efforts to deliver that value.

After joining the [United Nations Global Compact](#) initiative in April 2023, we were pleased in January 2024 to earn a bronze medal from [EcoVadis](#), the world's most trusted provider of business sustainability ratings, for our efforts around sustainability and inclusion—efforts which demonstrate our core value of stewardship: acting responsibly.

And in July 2023, we were recognized with a bronze [U.S. President's Volunteer Service Award](#) for our volunteer efforts in support of Junior Achievement® USA.

These are a few examples of how our efforts to make the world a better place are being recognized.

We are proud of the progress we have made—and continue to make—around our work related to environmental sustainability, inclusion, and labor and human rights, and we are honored to be recognized for our commitment to our communities.

We continue to report on our efforts related to the Sustainability Accounting Standards Board (SASB) framework, using select metrics from the professional and commercial services industry standard. The data for these metrics can be found in the appendix of this report.

Sustainability Accounting Standards Board Appendix



Professional and commercial services industry

As suggested by the [Sustainable Industry Classification System](#)[®]

Topic	Metric	Code	Response
Data security	Description of approach to identifying and addressing data security risks	SV-PS-230a.1	See Our firm: Information security
	Description of policies and practices relating to collection, usage and retention of customer information	SV-PS-230a.2	See Our firm: Information security
	(1) Number of data breaches, (2) percentage that (a) involve customers' confidential business information and (b) are personal data breaches, (3) number of (a) customers and (b) individuals affected	SV-PS-230a.3	Except as a matter of public record, RSM does not disclose this due to the sensitivity of this information.
Workforce diversity and engagement	Percentage of (1) gender and (2) diversity group representation for (a) executive management, (b) nonexecutive management, and (c) all other employees	SV-PS-330a.1	See Inclusion impact: Inclusion by the numbers
	(1) Voluntary and (2) involuntary turnover rate for employees	SV-PS-330a.2	See Inclusion impact: Inclusion by the numbers Involuntary turnover is not publicly reported
	Employee engagement as a percentage	SV-PS-330a.3	We participate annually in the Fortune/ GPTW survey. Most recent results (April 2023) show that 93% of our people say RSM is a great place to work (as compared to 57% of employees at a typical U.S. company).

SUSTAINABILITY ACCOUNTABILITY STANDARDS BOARD APPENDIX

Professional integrity	Description of approach to ensuring professional integrity	SV-PS-510a.1	See Our firm: Governance, quality and independence
	Total amount of monetary losses as a result of legal proceedings associated with professional integrity	SV-PS-510a.2	Except as a matter of public record, RSM does not disclose this due to the sensitivity of this information.
Activity metrics	Number of employees by: (1) full-time and part-time, (2) temporary, and (3) contract	SV-PS-000.A	See Our firm: RSM US LLP snapshot
	Employee hours worked, percentage billable	SV-PS-000.B	Except as a matter of public record, RSM does not disclose this due to the sensitivity of this information.



RSM'S **IMPACT**

We provide seamless global services across industries and borders to help middle market companies navigate the complexities of today's world.



OUR FIRM:

THE RSM EXPERIENCE:

**INTERGRATED SOLUTIONS FOR
THE MIDDLE MARKET:**

RSM US LLP

snapshot



Name:
RSM US LLP

Founded:
1926

Headquarters:
Chicago, Illinois

Managing Partner & CEO:
Brian Becker

Fiscal year end:
April 30

RSM by the numbers combined RSM US and RSM Canada

\$4.0B
revenue in fiscal 2024

1,185
partners and principals
in fiscal 2024

16,071
employees in fiscal 2024

6 locations
in Canada

1 location
in El Salvador

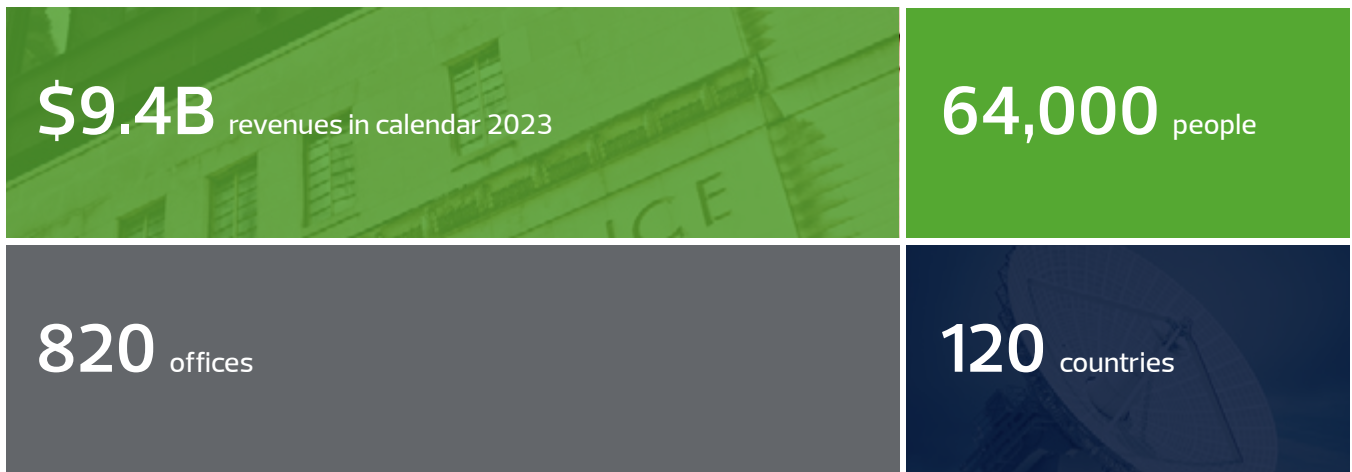
4 locations
in India

79 cities in the
United States

Revenue mix



RSM International

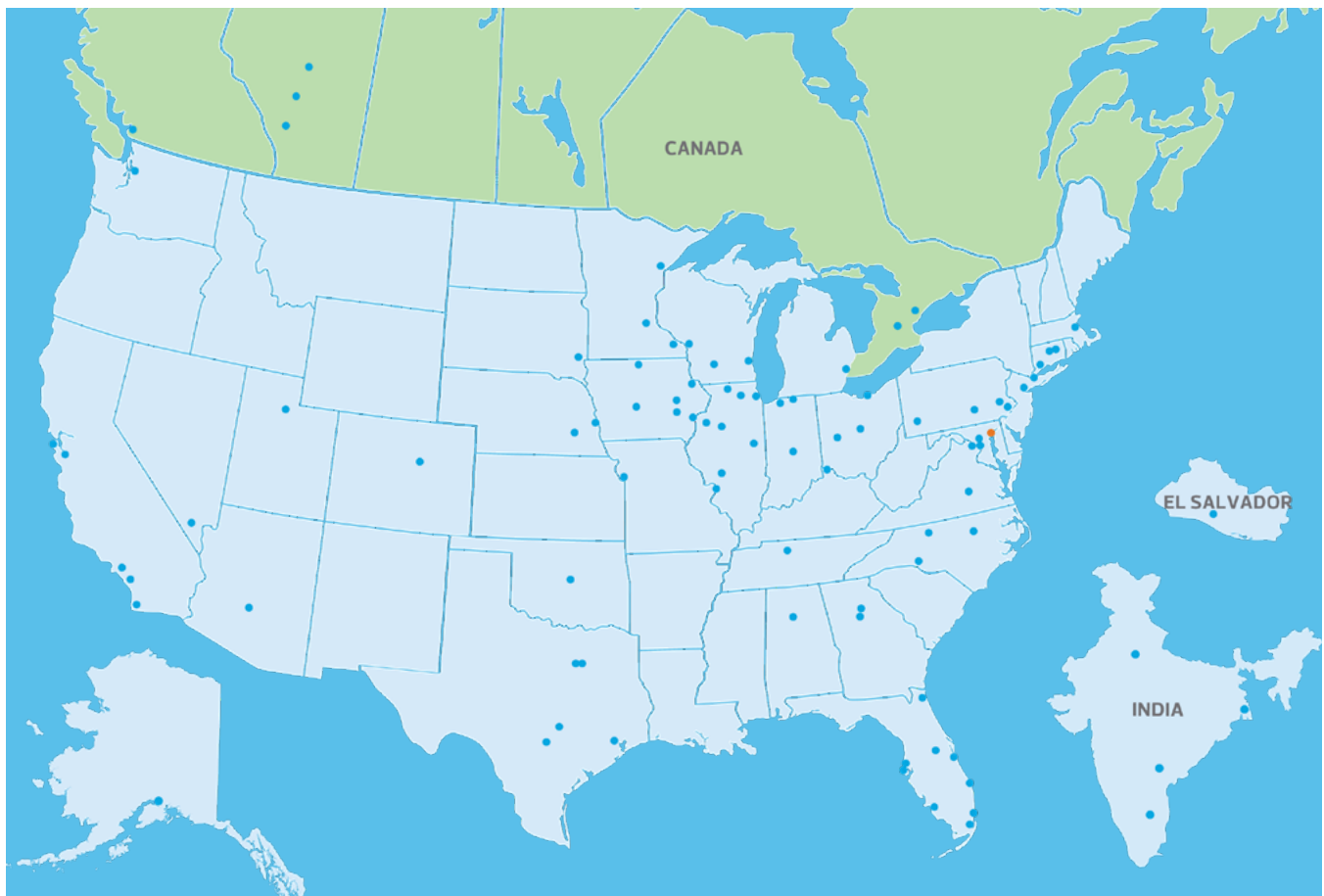


Our locations



Global reach, local presence

RSM is here to help your business wherever in the world you operate.



● Expansion of capabilities as a leading provider of integrated, holistic workforce solutions through the acquisition of Wise Consulting

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Governance, quality and independence



Building on our tradition of quality, integrity and excellence

The RSM US governance structure ensures the sustainability of our business and transparency with our stakeholders. Our board of directors serves as our governing body, focusing on our strategic objectives and continuously guiding RSM in the tradition of quality, integrity and client service excellence that have been the hallmark of our firm since its inception in 1926.

To uphold this high standard, all our people across the U.S., Canada, India and El Salvador annually affirm their compliance with our [code of conduct](#), our road map for ethical behavior. The code sets the tone for what we expect of ourselves and how we build trusting relationships with our clients, colleagues and other stakeholders. It is grounded in our values—respect and uncompromising integrity, succeeding together, excellence in all we do, impactful innovation, and stewardship: acting responsibly.

We take quality seriously. We continuously review our governance, quality and independence processes, systems and tools, leveraging technology and automation to ensure our people can accurately and efficiently uphold RSM and industry standards.

Our assurance, tax and consulting services are delivered according to RSM policies, relevant technical and professional standards, and applicable laws and regulations. Each line of business adheres to rigorous client acceptance standards and an inspection program to raise awareness of opportunities for continuous improvement.

In addition, RSM's assurance practice has implemented a system of quality management that provides reasonable assurance that our firm and our advisors 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.

RSM'S IMPACT

As a member of the RSM International global network, our firm is required to comply with global ethics and independence policies, including establishing and documenting RSM's independence, and that of engagement teams, prior to the provision of services. We use RSM InTrust as our system of record for independence evaluation. Any threat to or violation of independence is reported to and evaluated by the firm's office of independence for appropriate and immediate action.

Our firm does not tolerate bribery or corruption in any form and is committed to acting professionally, fairly and with integrity in all our business dealings and relationships. We are committed to complying fully with the Foreign Corrupt Practices Act, Canadian Corruption of Foreign Public Officials Act, Corruption and Crime Commission, UK Bribery Act of 2010 and all other applicable anti-corruption laws and regulations.

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 necessary information to follow up on a reported concern. Individuals can file a report anytime, day or night, by phone (+1 800 913 5052) or [online](#).

Reducing risk through automation

In fiscal 2024, RSM's office of risk management focused efforts on updating processes and technology to make independence and compliance activities easier for our people, reducing risk to our firm and our clients. For example, we are integrating our client onboarding processes such as entity preclearance, contracting, client/project acceptance and billing so our client servers can efficiently onboard our clients and focus on excellence in service delivery.

Information security



RSM's information security mission is to elegantly protect the confidentiality, integrity and availability of RSM and client data

To support this mission, our leadership team drives continuous improvement and includes appropriate levels of oversight, leadership participation and a risk-based approach to the control of protected information. Our people undergo information security and privacy awareness training upon hire and annually thereafter. This training includes ongoing phishing detection training.

We also have a dedicated information security team. Our chief information security officer leads the information security team which includes, but is not limited to, security operations, cyber incident response, security architecture and engineering, and information security governance.

Our information security standards are aligned with an internationally recognized industry standard for security, the ISO/IEC 27001 framework, and are guided by security requirements specific to our operating environment, as well as by laws and regulations relevant to our firm. Information security best practices are also taken into consideration.

Information security incident management

We actively monitor vulnerabilities, as well as potential security threats and events. We use industry-standard prevention and detection tools, including intrusion prevention systems, intrusion detection systems, data loss prevention, and security information and event management to protect our network. We also have an incident response plan and incident response task force that are engaged in the event of an incident.

Information security in vendor relationships

At RSM we perform a security review on vendor cloud-based solutions that store or access confidential information. Vendor contracts include confidentiality clauses and security, privacy, data integrity and data breach provisions, as needed. Contractor and other nonemployee contracts include a requirement to comply with our acceptable use and information security policy.

Collection, usage and retention of personal information

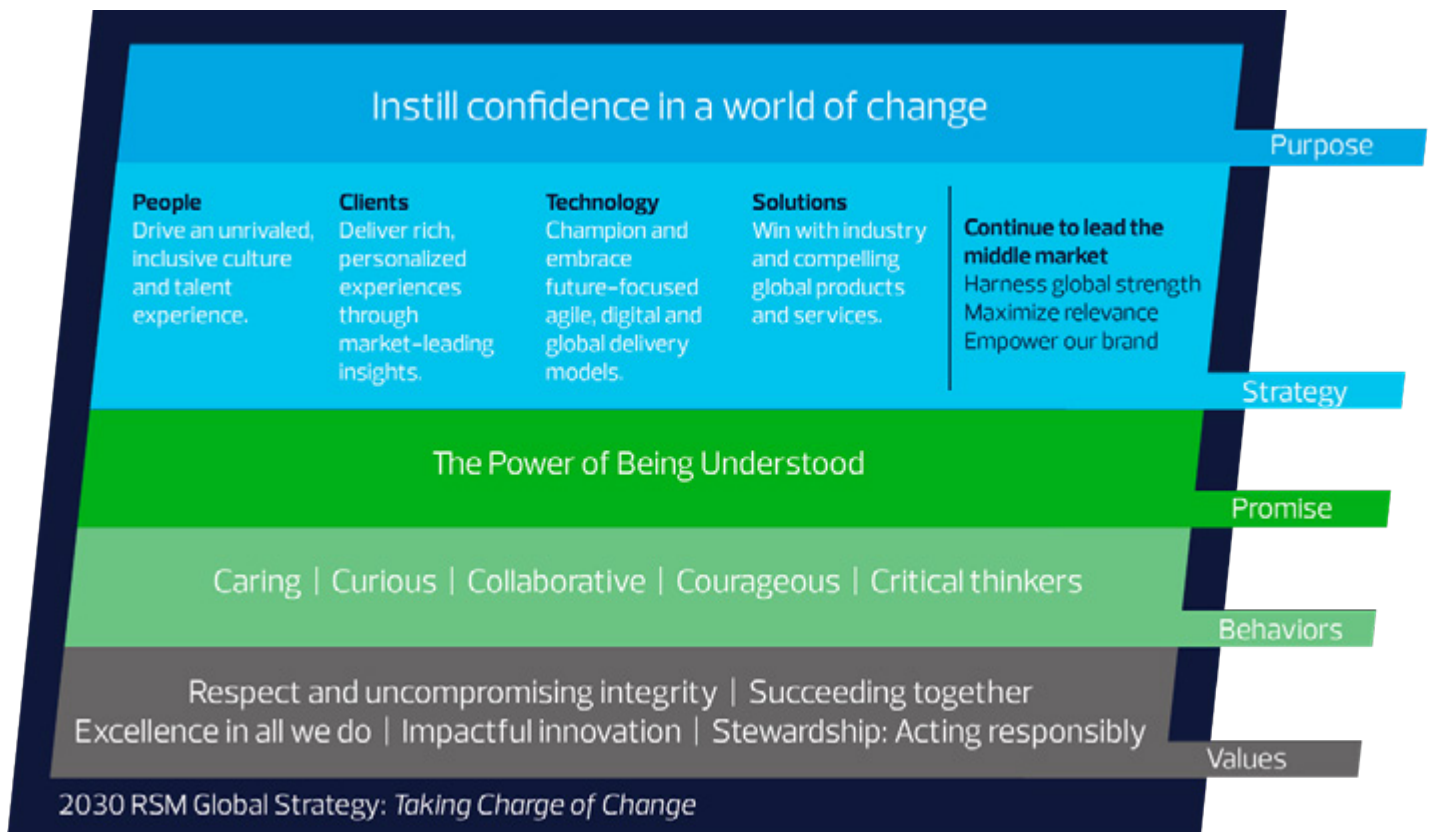
We collect, use and retain personal information subject to our publicly available privacy policy. As described in our privacy policy, we process such data for several purposes, including to provide services to clients. This data may be retained for as long as is necessary for the purposes described in our privacy policy, to achieve the purposes for which the information was collected or as permitted under applicable law. We have a dedicated privacy office led by our enterprise privacy leader and our privacy program is aligned with the ISO/IEC 27701 framework.

Firm strategy



Compelling, digital and global

RSM is focused on being a compelling, digital and global organization that instills confidence for our middle market clients in a changing world. Last year, we launched our Global 2030 strategy, uniting RSM member firms across 120 countries around a singular strategy for the future.



RSM'S IMPACT

In fiscal 2024, we aligned our lines of business around service lines, capabilities and solution sets to align people, develop deeper technical expertise, enhance quality and scale for the future. We deployed new digital solutions to enable our people and support our clients. We grew globally as a result of our aligned strategy, and on June 1, 2024, we welcomed a new global CEO to lead our strong global enterprise to new heights in the future.

RSM's future is bright as we continue to expand our position as the first-choice advisor to middle market leaders globally.

Compelling client experiences



Compelling client experiences start with understanding

At the core of every RSM client experience is our promise to understand our clients and deliver rich, personalized experiences through market-leading insights, giving our clients the confidence to move forward in a complex, changing world.

As the first-choice advisor to middle market leaders globally, RSM is driven to be a trusted global resource that cares about the success of our clients and delivers the power of being understood® to create value and instill confidence.

The power of being understood:

- Drives understanding of clients' unique business environments, aspirations and challenges
- Empowers knowledgeable, trusted global teams to deliver integrated services and value-added insights
- Leverages human intelligence powered by sophisticated technology to bring clarity to complex business challenge
- Enhances the ease of doing business

Compelling client experiences start with understanding

We named [Donna Sciarappa](#) enterprise client experience leader, a critical role to drive our middle market focus, client service excellence, and client satisfaction and loyalty.

Donna has been instrumental in leading our enterprise client service excellence strategy. Client service professionals across all lines of business leveraged training, tools and resources to enhance project management and digital dexterity to increase efficiency and performance on engagements.

Our revised Voice of Client process is part of our integrated client feedback and measurement system, which enables us to gather meaningful client feedback to better understand their individual needs and expectations and to extrapolate key themes to enhance the value of every RSM experience. We leverage the data gathered in this process to continue to positively differentiate the RSM client experience.

The RSM Market Insights Community launched as a platform for C-level executives' peer-to-peer engagement and open discussion of issues relevant to growth-oriented companies. Quarterly economic roundtable discussions with our Deputy Chief Economist Kevin Depew bring clarity to complex economic issues affecting these clients' businesses and industries.

Drive for Five, an issues-based conversation leveraging RSM thought leadership, equips our people with rich content to have deep, constructive conversations that enable clients to plan for economic and business changes. Our people have documented more than 4,300 of these conversations in just the last six months.

We also evaluated and streamlined our client onboarding process, specifically for client acceptance, project acceptance and master services agreements, to make it even easier to do business with us.

Our digital evolution is making it even easier to work with us. MyRSM, our integrated client portal, provides a single entry point for clients to access RSM solutions, insights, thought leadership and business functions. Today, nearly 15,000 clients have access to MyRSM. Others will have access as our line of business applications are integrated in the coming year.

Clients who feel understood are confident to move forward

Motivated to deliver the power of being understood, our business services practice challenged client service teams to initiate issues-based conversations to better understand clients and leverage project management experience and technology to deliver excellent client service. Within a year, the practice saw significant improvement in client satisfaction scores for overall experience, deliverables/services performed and project management. Here's what one client had to say about their RSM experience:

"When our company was carved out from our legacy parent company, we had none of the resources necessary to stand up accounting, finance and IT functions. Without a CEO, chief financial officer or chief technology officer in place, we leaned heavily on the teams at RSM to guide us through the carve-out. RSM's experience, deep understanding of our business and strong connection to our existing team enabled them to provide us the counsel and advice we needed to make critical decisions that kept us moving forward. In less than one year, they were able to implement a completely new ERP system, stand up an entire IT infrastructure and coordinate a move to a brand new facility. They were significantly more than just consultants for us."

– VICE PRESIDENT OF FINANCE, BUSINESS SERVICES COMPANY

A compelling talent experience



Our unique culture and strong values make RSM a compelling place for top talent to build their careers. With the changing needs of the workforce and evolving business priorities, our talent focus is also evolving to ensure we continue to provide an unrivaled, inclusive culture and talent experience for all our people.

Integrated talent function enables our people and the success of the firm

We are modernizing how RSM manages and supports talent by transforming our talent organization, processes and technology to empower our people and accelerate how the talent organization meets the evolving needs of the business.

As part of this shift, we integrated RSM's culture of inclusion team into our talent organization, shifting the operating model from an extracurricular program structure to a business integration model—further embedding inclusion into all areas of the talent experience, from recruitment to feedback to succession planning and everything in between.

Additionally, we created a new talent development and management Center of Excellence, bringing learning, professional development and performance management into one area of focus. This intentional connection ensures development programs are focused on what our professionals need to enhance their performance and grow their careers. By building enterprise capabilities and processes, the new team enables every person to do their best work today and be ready for what's next.

As a part of our focus on development, we also invested in a coaching practice to maximize both individual and team performance. The coaching framework takes a proactive and organized approach to coaching talented employees, owners and teams so they can accelerate their growth and enhance their performance in ways meaningful to the enterprise.

Digital enabled experiences

This year, we brought together people, process and technology to help deliver a digital enabled talent experience. We implemented new, user-friendly systems and processes to enable our people to find the information they need more effectively with new self-service options.

One example is Talent Compass, our new global human resources (HR) service desk. Talent Compass provides our people with a centralized place to get their personal HR-related questions answered. Through Talent Compass, our people can access on-demand resources and quickly connect live with a member of our talent team, enabling a consistent, streamlined experience.

Additionally, we transitioned to Workday as our integrated human capital management and finance system, replacing various existing systems with one modern application to simplify business processes and enable our teams to be as efficient and effective as possible across the globe.

Supporting nonlinear career paths

We also invested in building a dedicated internal mobility team to aid individuals looking to find new career paths at RSM, helping retain strong and diverse talent. The team has enhanced the mobility experience for the individual changing positions, their leaders and the HR teams through streamlined processes and new tools. Additionally, we are enhancing our global mobility programs and processes to better serve our global clients and better support our people traveling internationally and those working abroad on long-term assignments with RSM International member firms.

Recognized for our culture

We know our culture is something special and others recognize it too. This year alone, we were honored to be named:

- One of the [Best Companies to Work For in 2023](#) by Fortune and Great Place to Work
- One of [2023's PEOPLE Companies that Care®](#) by Great Place to Work and PEOPLE® magazine
- One of [America's Best Large Employers and No. 1 in Professional Services](#) by Forbes
- One of the [Best Workplaces for Parents™](#) by Great Place to Work
- A [Fortune 2023 Best Workplaces for Millennials](#)



Our digital future



The power of being digital

What does it mean to “be digital” in the face of a dynamic market? At RSM, it's how we are driving the next wave of digital transformation—across the middle market and our organization—to create lasting value for our clients, to empower our employees and to maintain our competitive advantage as first-choice digital advisors.

We are innovating for the middle market by advancing novel technologies and pioneering new ways of delivering services. In doing so, we offer forward-thinking insights and solutions, and foster continuous enhancements and opportunities for both clients and our people.

In the past year we have accelerated our pace of research, innovation and implementation. For example, we:

- Transformed our firm through a successful enterprise resource planning implementation of Workday, which has revolutionized our talent and finance organizations and set us on a modern data architecture path.
- Completed the transformation of our tax delivery capabilities with our trio of a single integrated ecosystem of cloud-based platform tax automation technologies of PartnerSight, FamilySight and CorporateSight.
- Launched the pilot RSM Luca, an AI-powered dynamic audit ecosystem that enables us to deliver audits using AI and data analytics to deliver relevant insights tailored to meet clients' unique audit circumstances.
- Developed the proprietary RSM Automated Compliance System (RACS) platform powered by AI and advanced language models to create and refine controls, map internal controls to applicable government regulations and industry best practices, and provide analytics to aid in the identification of control area deficiencies and compliance groups.

RSM'S IMPACT

- Pushed the boundaries of innovation with our 400+ professionals who have spearheaded the development of more than 100 cutting-edge industry-specific AI solutions and enhancement use cases with more than a dozen currently in design or development.

Our extensive digital insights, depth of resources and scale—along with our dedication to innovation—create significant opportunities to empower our clients who need to stay ahead of market shifts. Using digital solutions, RSM is achieving significant outcomes and transforming challenges into lasting benefits for clients: delivering intensified productivity, heightened informed decision making, increased operational efficiencies and precise financial analysis, evaluation and compliance.

Be digital, be global: Compliance automated

In the dynamic realm of global finance, navigating compliance requirements across diverse jurisdictions presents a formidable challenge.

Our clients—often multinational corporations with expansive operations spanning multiple countries—are regularly faced with the intricate task of ensuring compliance, knowing that any misstep could lead to severe penalties, legal entanglements and reputational damage.

RSM identified the need for efficient global compliance management and risk reduction. We responded with RACS, our automated compliance platform. RACS marks a major leap in tech modernization, driving digital transformation in accounting.





Harnessing the power of AI, we embarked on a transformative journey by developing a compliance platform that redefines how our clients address their regulatory mandates. RACS leverages sophisticated algorithms and machine learning to automate real-time analysis of compliance requirements across numerous jurisdictions. It identifies pertinent regulations, updates and deadlines, empowering our clients to stay ahead of the compliance curve. Our AI-driven solution is crafted to adapt and evolve continuously. By learning from each interaction, it enhances its accuracy and efficiency over time, delivering unparalleled insights and efficiency.

The impact of our technological innovation has been profound. RACS has saved clients' time, cut costs, minimized errors and enhanced compliance reliability. Our compliance solution has empowered our clients to navigate global regulations with confidence and has also solidified our position as pioneers at the nexus of technology and accounting.

RSM's unwavering commitment to leveraging technology to provide unparalleled value to our clients exemplifies our belief that in the digital era strategic use of technology is paramount for addressing complex business challenges and achieving operational excellence while leveraging innovation to best serve our clients.

Extensive global resources



Compelling to our clients, digital in our approach and global in mindset

Middle market companies are global; so is RSM. As the leading firm serving the middle market, RSM is uniquely qualified to help growing, internationally minded companies seize opportunities and feel confident taking charge of change in an increasingly complex world.

In fiscal 2023, RSM ushered in a new vision

This year, we further integrated our 2030 global vision, Take Charge of Change, bringing together the strengths of our global organization and mobilizing our teams as we strive to be the most compelling, digital, global organization leading the middle market into the future.

E.J. Nedder was announced as RSM International CEO effective June 1, 2024. E.J. brings deep experience leading change and will help digitize our global network while evolving our global capabilities to deliver compelling industry insights, integrated solutions and the strategic relationships middle market companies need to succeed.

As the largest firm in the RSM network, RSM US has strong representation on the RSM International Board of Directors, as well as on its strategy and transformation advisory committees to help drive RSM toward our 2030 global strategy. We continue to make significant progress on our key strategic pillars.

In January 2024, we launched RSM's evolved global brand around the world, with new elements that reflect our modern, forward-looking brand that is compelling, digital and global.

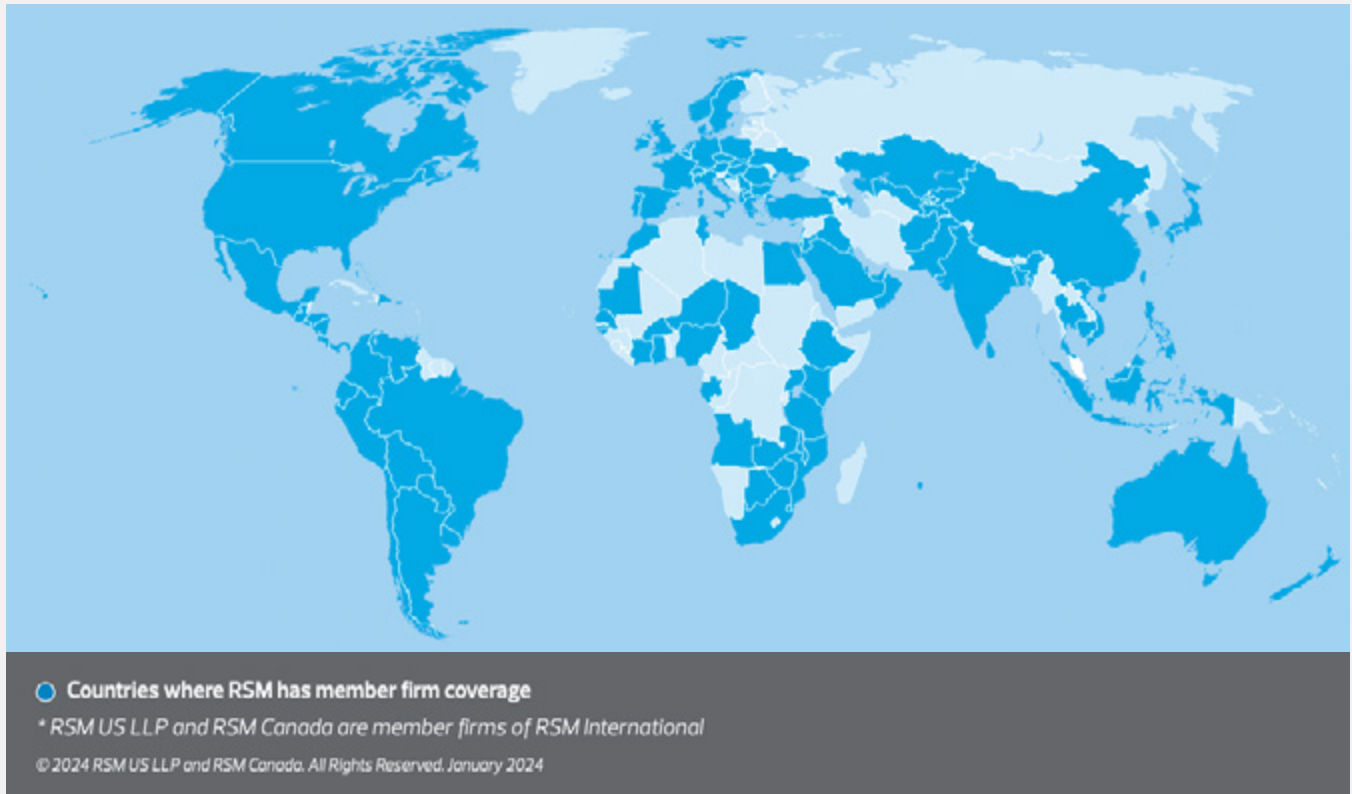
RSM US—India infrastructure, adoption and expansion. We operationalized our functions in India, with more than 2,000 people across all lines of business, service lines and firm-facing functions. We validated our differentiated employee value proposition in India, developed an integrated talent marketing and public relations strategy to further build our brand and reputation, enhanced our compensation and benefits, enhanced career progression, and developed policies and guidelines for global mobility.

Network strategic alignment and advancement. Our global network and other strategic relationships are bringing the full power of RSM to our internationally active clients. This year, RSM US contributed to a global sustainability strategy and governance model; built global practices around key solution sets and channels; and implemented enhanced global cybersecurity policies, procedures and governance.

Compelling global client experiences and growth. We are enabling a globally focused ecosystem of people, processes and technology to create compelling global client experiences and provide consistent delivery of high-quality solutions and thought-leading insights. This year, we completed several significant client contract and onboarding process improvements to make it easier to work with us and improve collaboration across member firms.

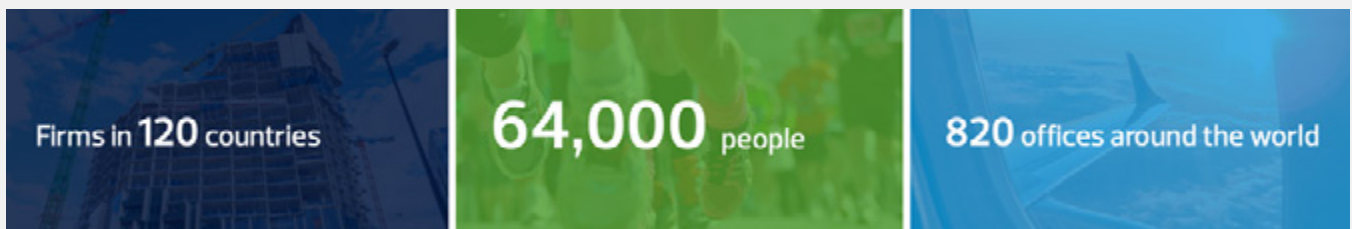
Globally focused talent, capabilities and culture. At RSM, we strive to be first-choice advisors. One key theme of that role—for clients and talent—is that first-choice advisors are sought out for the value they provide. This year, we focused on developing a global mindset among our people to enhance value and insights that help clients move forward on global strategies.

Countries where RSM has member-firm coverage



Global strength, local relationships

RSM US is a member of RSM International, the sixth-largest global network of independent assurance, tax and consulting firms. For 2023, RSM International's worldwide revenues were \$9.4 billion, a year-over-year increase of 16%. As the leading provider of professional services to the global middle market, RSM has seen double-digit growth in five RSM regions for the third consecutive year, with robust growth across all service lines globally. Since the launch of RSM's 2030 global strategy in 2023, we have been implementing the critical building blocks for ongoing growth, transformation and change, focusing on four strategic drivers—people, clients, technology and solutions.



The impact of assurance



Thanks to our talented people and ongoing digital and operational enhancements, we remain the leader in providing [audit and assurance services](#) to the middle market.

Why it matters

Amid changing stakeholder expectations, an evolving regulatory and business environment, and rapid technology advancements, further developing our assurance practice has allowed us to serve our clients and positively affect our people, the capital markets and our profession.

- **Our focus on audit quality** and applying due professional care inspires confidence and trust, enabling clients to attract investment and foster long-term relationships with their stakeholders.
- **A destination of choice for top talent**, we now have more than 4,000 professionals across the U.S., Canada, India and El Salvador. Last year, we delivered more than 8,000 insightful, data-driven audits adapted to our clients' industries and unique business circumstances.

Investing in innovation

To increase automation and enhance the audit experience, we added 11 new technology solutions and implemented a generative AI pilot, further evolving our RSM Luca digital audit ecosystem. These investments have increased audit quality and efficiency while ensuring that auditing remains an exciting and attractive career.

- **Creating capacity for critical thinking** and higher-value activities leads to a more personalized audit and empowers our auditors' professional lives.
- **Delivering human insights powered by technology** enables clients to make better-informed business decisions.

Positioning for the future

To create greater value for clients and drive long-term growth, we shifted our organizational structure to be oriented around four service lines: financial markets, services, products and the public sector. Practicing along industry lines enables us to expand our experience to better serve clients, develop our capabilities and help our people progress in their careers.

- Building teams by bringing together the best people regardless of location, while keeping important local relationships, has sparked collaboration and enhanced engagements.
- Further integration of India-based colleagues, now numbering more than 400, has boosted capacity, supplemented skill sets and balanced workloads.
- Thought leadership and board engagement amplifies our voice in the middle market conversation and demonstrates RSM's command of our clients' issues.

Developing our people

We enhanced opportunities for our professionals to build technical, leadership and analytical skills, and fostered ways for them to deepen knowledge and broaden their global perspective.

- More than 270,000 hours of continuing professional education training represented an increase of more than 16% over the prior year. This included expanded learning for newer employees and an innovative human insights challenge.
- 116 professionals participated in global assignments and rotation programs with our national professional standards group and office of risk management.
- 50 high-potential managers were tapped for FutureMakers, an 18-month leadership development program.

Enhancing our profession

RSM continued to play a leadership role in assurance standard setting, partly through active public policy engagement.

- Our chief auditor chairs the American Institute of Certified Public Accountants (AICPA) Auditing Standards Board and is on the Public Company Accounting Oversight Board's standards and emerging issues advisory group. National office leaders also serve on AICPA committees.
- We are strong advocates for modernizing standards to reflect changing technology and shifting risk assessment criteria. Expanding assurance services to sustainability and other areas shows the importance of the CPA profession beyond traditional financial reporting.

What assurance clients are saying:

“ I have worked with most of the accounting firms over my career and this RSM audit team is one of the best that I have worked with. They brought up accounting issues that were relevant for our company and once we addressed those issues, they gave us their opinions and additional information to support our conclusions.”

“ Every experience we've had with RSM has been positive. Whether we ask them simple balance sheet-related questions or difficult ones like the economic impact on our existing portfolio, they always have a clear and concise answer.”

“ The knowledge [the RSM team] provides, the attention to detail, the unmatched reliability and the communications with the board, management and committees makes us always feel understood and supported.”



Tax strategies



Responding to the needs of the middle market, we continue to evolve our tax practice with a focus on agility to serve clients with the right team, across the country and around the world.

Pairing our industry and technical insights, we create a rich first-choice advisor experience for our clients with professionals who understand their business and are adept at forecasting industry and technology trends and considering other external factors that give our clients the tools to not only comply but thrive. areas, we've cemented our place as a global tax services leader of the middle market.

Driving insights through proprietary technology

At RSM, we continue to innovate and bring increasingly greater value to our clients through the use of dynamic technology, driving insights into opportunities to accelerate growth for our clients while enabling risk management in a changing regulatory landscape.

The RSM tax ecosystem provides organizations access to data to scale operations and concentrate on high-impact opportunities. Combined with our middle market and industry knowledge, our proprietary technology empowers our people to deliver high-quality, tailored solutions that bring clarity and instill confidence in a world of change.

“Global value-added tax (VAT) is becoming increasingly complex and digitized as tax authorities around the world require more automation and more data. RSM's Global VAT Compliance solution was relaunched in fiscal 2024 with new technology, new processes and a new team of specialists in RSM US–India at the forefront of supporting our clients' global compliance needs. Coupled with our new global e-invoicing service, we've gone from strength to strength in fiscal 2024, bringing clarity and automation to globally operating companies as they confront more demanding tax authority requirements.”

– DUNCAN STOCKS, VAT PRINCIPAL, RSM

Bringing clarity amid economic and legislative uncertainty

Our tax policy team of U.S. and global tax leaders provides steadiness in the shuffle, positioning businesses to be able to prepare today for what might happen tomorrow.

Tax policy is always front and center in Washington, D.C., yet in a divided government, uncertainty about tax legislation and broader economic impacts can become the norm. At RSM, we understand this dynamic and strive to enable businesses and individuals to successfully navigate the gap by reconciling tax policy and economic uncertainty with real-time business needs and challenges.

This year, our tax policy professionals represented the voice of the middle market in our nation's capital, from submitting comment letters to hosting educational sessions for lawmakers and staff on Capitol Hill to regular meetings with House Ways and Means and Senate Finance Committee staffers on issues important to our clients.

For our clients, RSM led the way in deciphering the major business provisions of the Tax Cuts and Jobs Act and the pending enactment of the Organisation of Economic Co-operation and Development's Pillar Two and the global minimum tax (GLoBE), cutting through the noise and highlighting what companies need to know and do. In addition, our global team of tax policy professionals kept a keen eye on the global tax policy dynamic, distilling key developments and layering in additional insights and perspectives. By keeping a finger on the pulse of Washington and the global tax landscape, we continue to deliver value to our clients domestically and globally.

Consulting services



Innovative solutions for economic adaptability

In the dynamic tapestry of today's economic landscape, adaptability and foresight are critical factors for sustainable success. Our consulting services are founded on a commitment to agility, weaving together profound industry insight and global perspective.

Our holistic approach goes beyond problem-solving, driving remarkable growth. Our strategies involve fostering managed services growth and expanding revenues through channels like public companies and government contractors.

We are extending our focus globally, actively supporting clients with international operations, ensuring seamless integration into the broader market. Embracing innovation and anticipating trends, our consulting services professionals stand ready to propel organizations toward sustained prosperity in today's dynamic business environment.

Culture and growth

RSM is committed to empowering individuals to be trusted advisors, leveraging unique industry insights and embracing diverse perspectives. As our organization expands, we continue to safeguard and nurture this distinctive culture.

The evolution of RSM's vision and strategy embodies thoughtfulness, collaboration and intentionality. Three key objectives steer our course:

- Cultivate a transparent, compassionate and authentic environment fostering meaningful connections
- Empower individuals to customize leadership, advisory and specialized skill development opportunities
- Foster an equitable and inclusive firm, enabling diverse talent to thrive

These objectives emphasize our dedication to maintaining a culture that sets RSM apart and also empowers our people to excel, innovate and contribute to a dynamic and inclusive professional community.

“In our business, the heartbeat of success resonates in the collective spirit of our people. They are not just a part of our organization; they are its essence, driving innovation, shaping culture and fueling the engine of our success.”

– PAT VANCE, PARTNER AND NATIONAL CONSULTING LEADER, RSM

Unlocking strategic potential: The evolution of managed services

Looking ahead in an era marked by volatility, transformation is not a one-time event but an ongoing necessity for sustaining competitive advantage. Managed services have evolved into a crucial component of this continuous journey, positioning organizations at the intersection of innovation, expertise and strategy.

Today, we see a shift from the traditional focus on cost-cutting and labor arbitrage in outsourcing, as organizations increasingly turn to leading providers for high-value, knowledge-intensive processes. This departure represents a shift from the legacy model of “your mess for less” to a focus on judgment-intensive work, including core operations that were historically considered too critical to transfer.

Digital

It's more than just a buzzword; digital is the dynamic catalyst moving the industry forward. Digital tools empower our consultants to swiftly analyze extensive datasets, distill meaningful insights and deliver real-time, actionable recommendations to clients. This digital transformation transcends mere technological adoption; it represents a paradigm shift, enhancing efficiency, fostering innovation and placing client-centricity at the forefront in the ever-evolving business landscape.

Industry

To deliver the comprehensive capabilities of our firm to clients, RSM professionals leverage distinctive industry insights tailored to each client's needs. By delving into the nuances of our clients' respective industries, RSM consultants uniquely position themselves to discern and address intricate operational challenges specific to each business. This intimate understanding ensures that our solutions are not only effective but also precisely tailored to optimize performance and drive sustainable success.

Future forward

Specifically curated for middle market clients, our services transcend the conventional to position us as industry thought leaders. We are strategic architects, skillfully optimizing processes, deftly navigating risks and meticulously positioning businesses within the intricate web of market dynamics. Our consulting services emerge not merely as solutions but as dynamic narratives of transformation and strategic insight.

“Recently, I have engaged RSM to help with the transition of the new CIO. This has been a very positive experience. They aren't 'telling' us what to do, but rather guiding us through discussions with active participation from all parties. It's exactly what we needed.”

– RSM CONSULTING CLIENT

Industry focus



Deep knowledge drives cutting-edge industry solutions

RSM has deep and established connections with a wide range of industries. We pride ourselves on keeping up to date with the needs of our clients and, perhaps more importantly, what they may need in the future.

Here are some examples where our leading-edge knowledge intersected with our extensive experience in assurance, tax and consulting to form a winning combination.

A regional bank rides out risk concerns with a life raft from RSM

It's never a great day for a bank when the FDIC gives you a list of things to fix.

One regional bank found itself a bit flat-footed when it was the subject of a full-scope, on-site examination of its performance. While the bank had plans to update their risk model function, it hadn't had a chance to integrate fully with the systems in place. That meant multiple matters requiring attention (MRAs) and matters requiring immediate attention (MRIAs) and a tight deadline to resolve them.

With the understanding that hasty solutions are not always the most strategic, the bank engaged RSM to help build the program. RSM's experience with financial institutions and with FDIC regulations and requirements meant that our valuable insight not only resolved the findings from the examination but also set the bank up for the maturation of its program as the organization grew.

Ultimately, the bank was able to clear the outstanding MRAs and MRIAs and receive a positive score. Better yet, it can now go confidently into the future, knowing that their collaboration with RSM has improved its risk profile.

Smoothing communication for international inquiries

When a Midwestern industrial product company ran into an inquiry from the Dutch taxing authority, the company turned to its international tax advisor, RSM.

RSM'S IMPACT

Initially, the company thought it could handle the inquiry with its in-house finance group but learned there was a significant knowledge gap when it came to pricing and international tax. The company was ultimately not equipped to provide the detailed reports demanded in the inquiry, nor could it spare the staff to focus on it. After a drawn-out and ultimately unproductive back and forth with the Dutch taxing authority, the company's chief financial officer asked RSM to work with its team to resolve the issue.

That did the trick. RSM provided a detailed memorandum explaining the organization's structure, business model and pricing policies. Satisfied with the complete view of operations, the Dutch taxing authority stopped the inquiry, and the company had a model for addressing questions about its transfer pricing in the future.

Seeing double: Digital twin technology aids in food production bottom line

Manufacturers depend on modeling and projection tools to inform decisions regarding personnel, efficiency, processes, volume and where to invest for the highest return. But there can be a thousand ways to model and interpret data, with nearly unlimited potential outcomes.

RSM's digital twin model made all the difference. Through in-depth discovery, including thorough collection of existing data and discussion of future state scenarios, RSM was able to work with the company to build a model of a similar system, run simulations and then modify the model to reflect possible scenarios and questions.

RSM then summarized the findings for key stakeholders, giving them the information needed to implement necessary production shifts to address the anticipated demand. These insights led to informed decisions that helped the company meet its targets and saved valuable time and money on investments that would not have yielded such positive results.

Empowering exponential growth: RSM and Magic Spoon make a terrific team

Magic Spoon took their business from online sales to national retail chains in just a few years, and they have no plans of slowing down. But to make it onto more breakfast tables, the healthy cereal brand needed to implement an information technology (IT) strategy and an enterprise resource planning system that will take the company to the next level. The Magic Spoon team is lean and busy, and they needed to work with a team that can take the ball and run with it.

Enter RSM and Microsoft Dynamics 365 Business Central. A thorough understanding of the systems already in place for Magic Spoon, as well as deep experience in the food industry, enabled RSM to set up a seamless solution by the deadline. Now Magic Spoon is in more than 7,000 retail locations, and the data and insights provided by Microsoft Dynamics 365 Business Central are powering the company's future marketing and promotion efforts.

Breaking ground with AI: Helping a city and its citizens get things done

Anyone who interacts with local government, from city employees to citizens, will agree the bureaucracy can be a pain point. Actions as routine as permits, information and even simple Q&As can be cumbersome processes for all involved, costing time and resources.

The Canadian City of Kelowna wanted to smooth out those processes. The city engaged RSM, which brought in Microsoft. Tapping into our knowledge of the needs and challenges of municipalities and residents, RSM used Microsoft technology to implement a secure and scalable AI solution to streamline everyday processes and free up valuable time and resources for the city and their residents.

Kelowna is among the first cities in Canada to implement this technology, and RSM is proud to be a part of that milestone in technology and civic engagement.

Nurturing management firms at every stage of a fund's journey

When it comes to private equity, RSM dialed into decades of knowledge and saw a need: a holistic solution that brings the full power of our firm to the private equity and real estate ecosystems, from fund administration and accounting, tax, technical advisory and beyond. That's when Fund Services+ was born; it's an integrated one-stop shop for our clients with the highest quality professionals and the option to take advantage of additional services that RSM already has experience in, such as valuation, planning, environmental, social and governance (ESG), regulatory compliance, and beyond.

From our emerging fund clients coming in around \$500 million to multibillion-dollar firms, we've engaged with several clients in the last year to take their back-office operations to the next level.

RSM offers the most qualified people, premier technology and industry leaders' knowledge to conquer vendor fatigue and streamline private equity and real estate firm needs under one roof. We offer scalability and sustainability with Fund Services +.

Leading the middle market conversation



RSM leads middle market conversation in challenging economy

AI. Finance. Labor. Supply chain. These were among the trending topics RSM covered for current and potential clients and the media as the middle market conversation unfolded throughout fiscal 2024.

Our insights and the issues facing midsize businesses gained momentum in a challenging economy characterized by inflation, higher financing and input costs, and continued low unemployment.

Our ongoing focus on developing a team of in-house economic analysts marked its sixth year. The RSM Industry Eminence Program, led by Deputy Chief Economist [Kevin Depew](#), added 11 analysts in fiscal 2024 for a total of 62 participants across the firm's focus industries, including a growing roster in Canada and the UK. Ten additional analysts were recruited for fiscal 2025. Meanwhile, Sydney-based economist [Devika Shivadekar](#) joined RSM's global economics team, broadening the reach to Australia.

Throughout the year, as concerns of a potential recession loomed, RSM economists maintained a balanced perspective, often defying doom-and-gloom headlines in mainstream media with data-driven analysis. In December, RSM Chief Economist [Joe Brusuelas](#) and our economics team were recognized by Bloomberg as among the best forecasters of benchmark 10-year Treasury bond yields for 2023; their analysis underscored an expectation for a soft landing, an expectation that was eventually proven out.

Alongside anchor commentary from Brusuelas and economists [Tuan Nguyen](#) (U.S.) and [Tu Nguyen](#) (Canada) who both have doctorates in economics, perspectives from the industry analysts offered critical views at the sector level. These insights were pervasive—in [quarterly industry outlook reports](#) and other thought leadership; in client, prospect and in-house

RSM'S IMPACT

presentations; in industry association roundtables; and on external webcasts. Journalists took note: the team secured frequent appearances in national print and broadcast media, including the New York Times, the Wall Street Journal, the Hill, CNN and Yahoo Finance, among others, as well as a long list of trade publications.

The [RSM US Middle Market Business Index](#) (MMBI) entered its eighth year, providing a distinctive quarterly reading on the middle market economy from executives across a range of industries. Separate MMBI special reports helped to unpack complex topics such as the financing environment, cybersecurity and workplace trends.

The MMBI, The Real Economy and the Real Economy Canada, the firm's periodic economic publications, as well as the [Real Economy Blog](#), RSM's platform for real-time insights on market-driven trends, comprised the firm's full spectrum of economic insights for the near- and longer-term.

We also pushed ahead with efforts to spotlight prominent tax issues, such as the treatment of research costs and interest expense deductions, with national lawmakers. In September, our firm's tax policy and Washington National Tax teams were on Capitol Hill communicating with members of Congress, industry representatives and reporters about how limits on business interest expense deduction were affecting midsize companies. Our thought leaders continue to translate how regulatory developments, such as Securities and Exchange Commission rules governing cybersecurity and climate reporting, affect midsize businesses.

Together, these efforts have enabled RSM to stake its claim as owning the middle market conversation in an increasingly complex economic and policy environment.



RSM'S COMMITMENT TO SUSTAINABILITY

The diverse and inclusive thinking of our people, combined with a focus on the present but an eye to the future, enables us to provide innovative solutions for our clients, our people, our communities and our planet.



INCLUSION IMPACT:

COMMUNITY IMPACT:

ENVIRONMENTAL IMPACT:

Stewardship: The cornerstone of sustainability

Dear clients, colleagues and friends,

One of our firm values is stewardship, which we define as acting responsibly. And our more than 17,000 people live that value every day. Stewardship is all about leaving things better than you found them. It's about making progress to better our firm, our communities, our people and our world. There is no destination—only forward progress. There's always something more we can do.

With stewardship in mind, we continue to double down on our commitment to sustainability. This year, we formed the ESG steering committee, which I have the honor of chairing while working alongside our CEO and other executive leaders of our firm. Bringing together governance for our inclusion efforts, environmental initiatives, community-giving platforms and more, is helping us drive positive change for our people, clients, communities and the firm overall.



“Stewardship ... is about making progress to better our firm, our communities, our people and our world..”

— TY BEASLEY, CHIEF TALENT OFFICER, RSM



RSM team in Dallas at the firm's 2023 volunteer day.

We're proud of the progress we've made to date and look forward to continuing to evolve and enhance our efforts in a rapidly changing world.

Sincerely,

Ty Beasley, Chief Talent Officer

Inclusion by the numbers



Vision for the future

Through a culture of inclusion, our vision is to develop and leverage a workplace that values and celebrates the unique backgrounds and diverse perspectives of our team members. Doing so will allow us to sustain our unrivaled, inclusive culture; drive innovation and collaboration; and achieve business results.

Inclusive skill-building

Goals

1. Continue to build and expand mentorship and sponsorship programs, including growing participation in the culture of inclusion mentor program.
2. Maintain high satisfaction of enterprise employee network group (ENG) members.
3. Enhance our professionals' inclusive leadership skills through learning opportunities for all, with a focus on manager, director, managing director and partner levels for their critical role in sustaining an inclusive culture.
4. Continue to invest in the development, skill-building and enrichment of our professionals across all backgrounds to ensure inclusive leadership teams.

Community impact

Goals

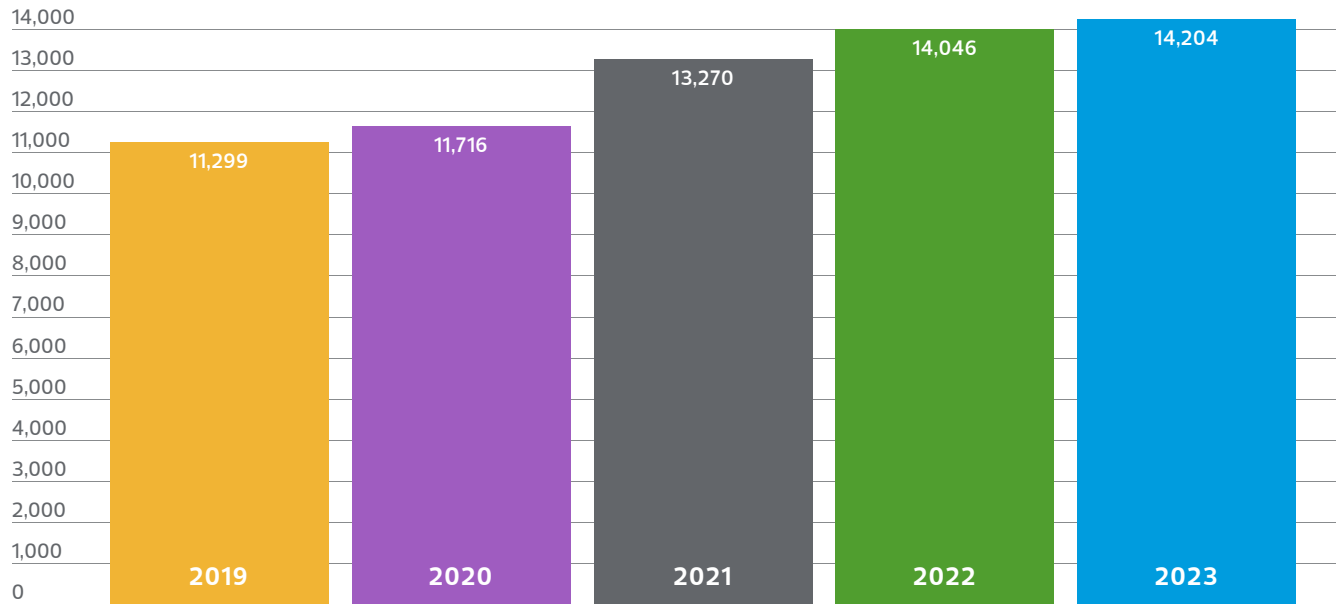
1. Continue to expand RSM's candidate pipeline, working with a wide range of educational institutions, including historically Black colleges and universities and other minority-serving institutions and organizations.
2. Continue to expand the pipeline of future accounting professionals through programs for students early in their college careers.
3. Increase relationships with minority business enterprises, women business enterprises, disabled business enterprises, disabled veteran business enterprises, veteran-owned small businesses, LGBTQ+ owned business enterprises and diverse professional organizations.

At RSM, we are committed to creating an inclusive workplace in which professionals with different backgrounds, ideas and perspectives can come together to drive innovation and creative problem solving for our clients. As part of this commitment, we realize the importance of understanding and using data to prioritize our efforts and initiatives so that we can continue to create a workplace culture where everyone is confident about their future.

Over the past five years, the number of RSM team members has grown by more than 25%. During this period, the firm has grown the number of professionals across all demographic categories. As RSM continues to grow, we expand our leadership and the number of people on our team—creating more opportunities for all.

RSM team members—calendar years 2019–23

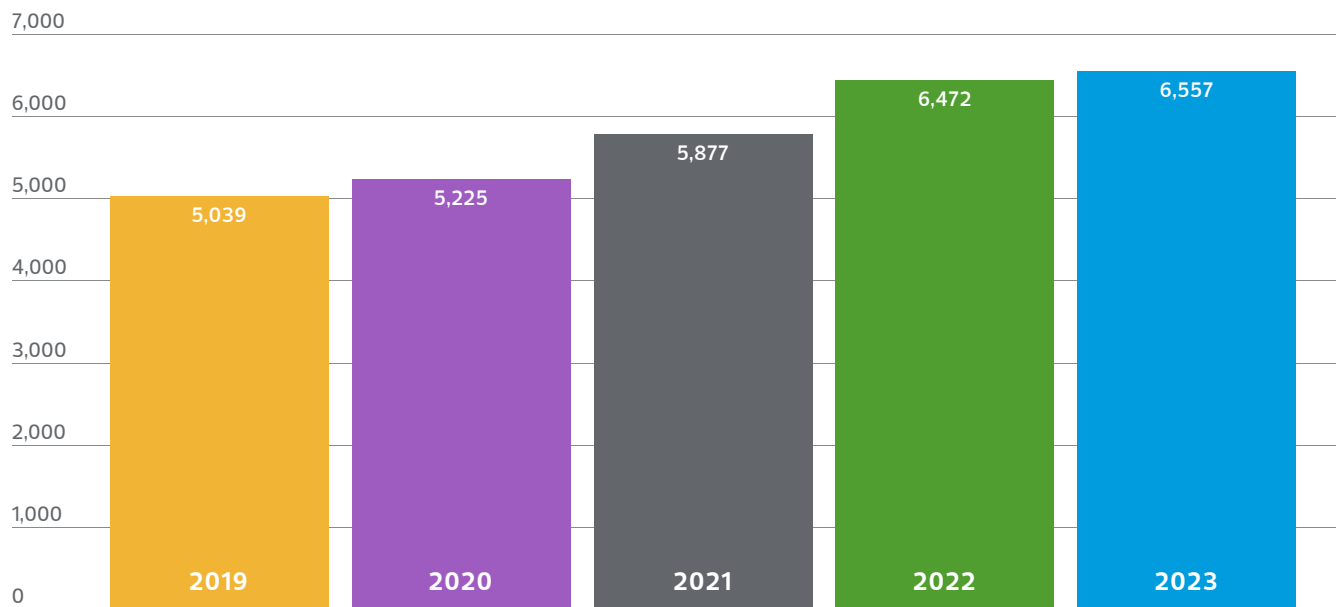
Total RSM team members



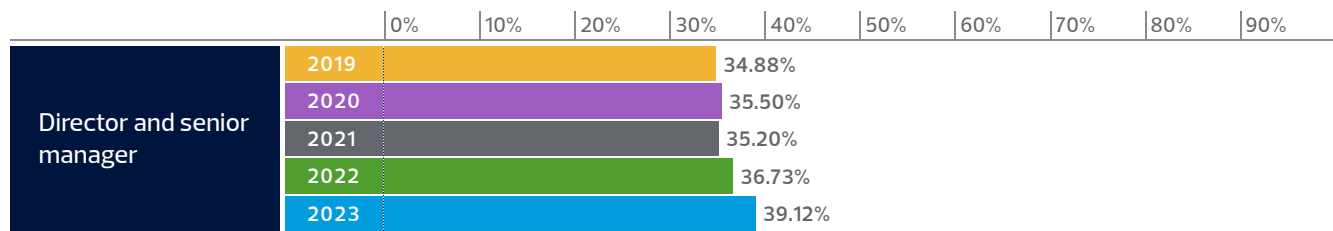
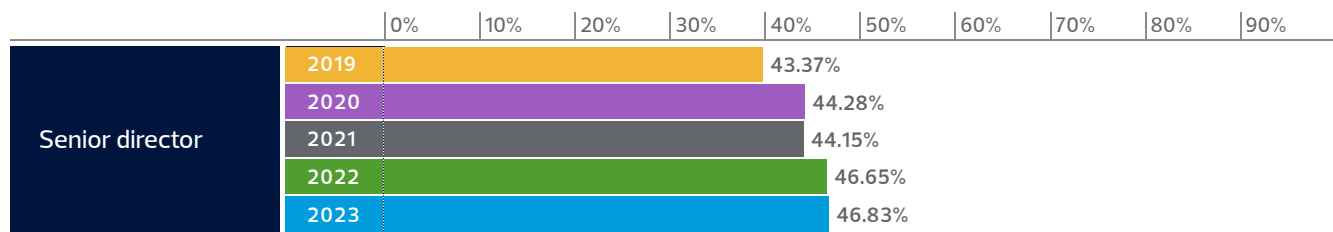
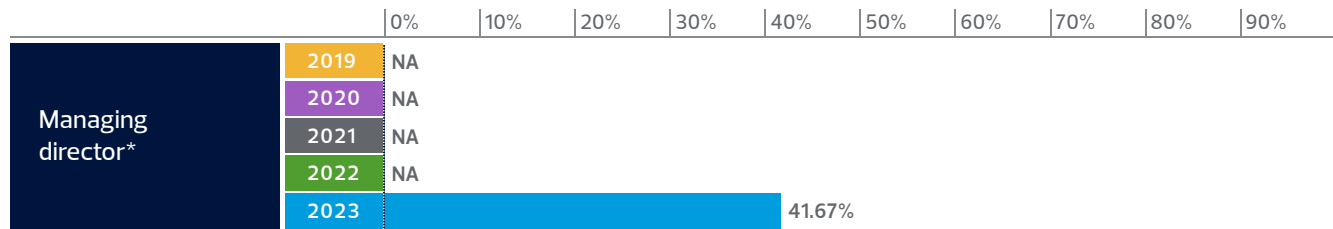
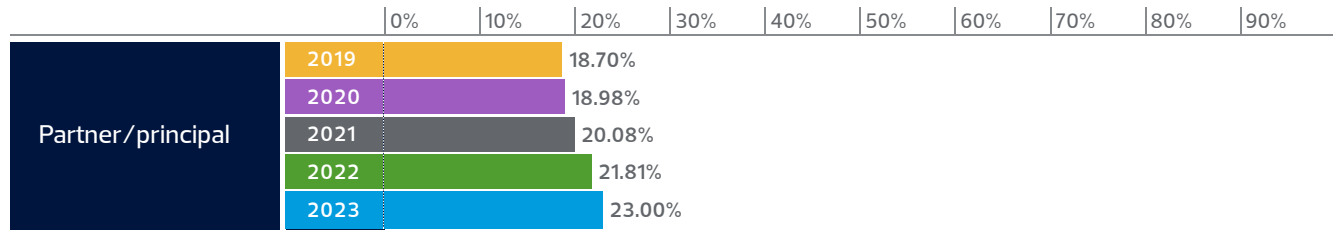
Women

RSM continues to focus on stewardship and teamwork for the advancement and retention of women. As RSM continues to grow, so does the representation of women at all levels of our business.

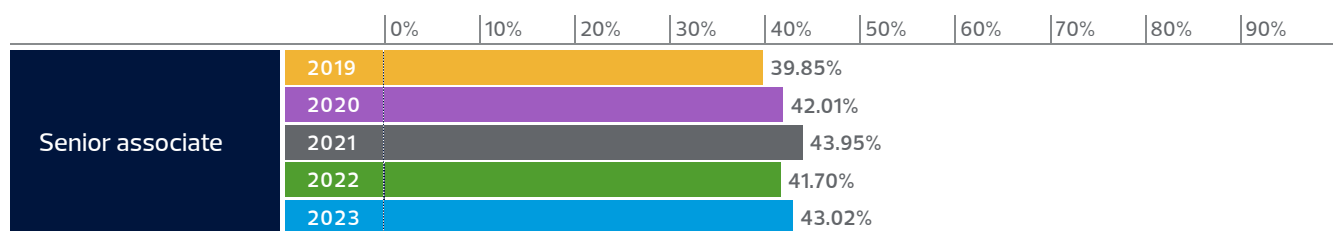
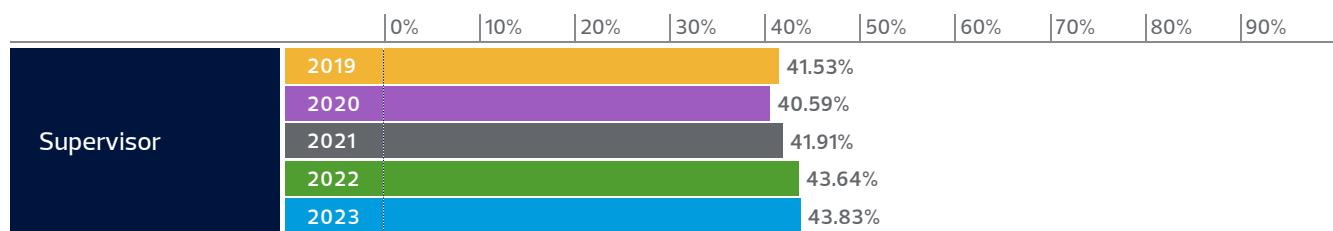
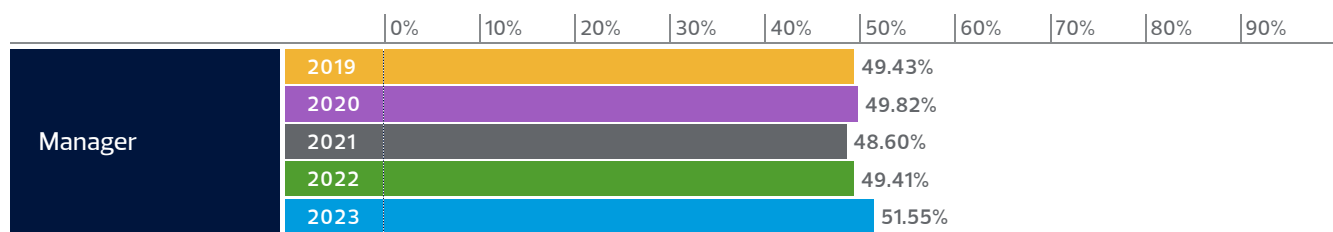
Women at RSM



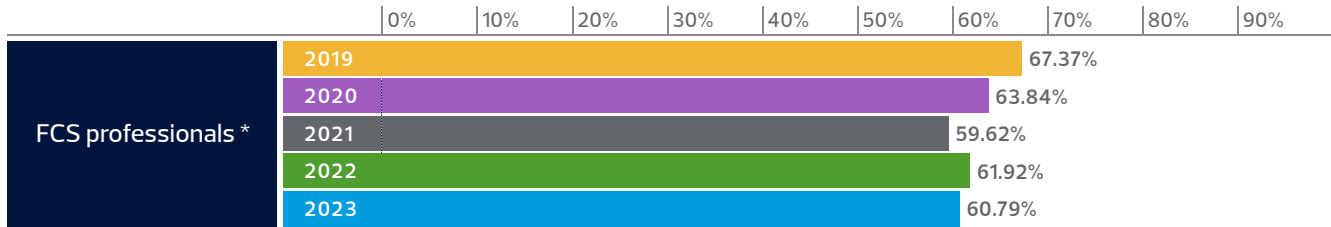
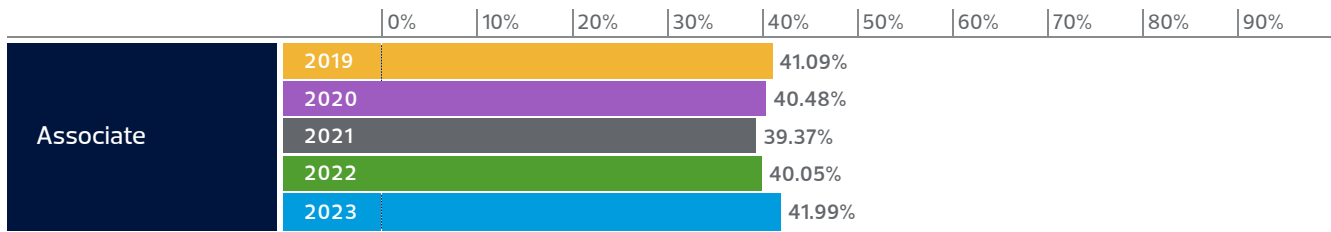
Representation of women as a percentage by level—calendar years 2019–23



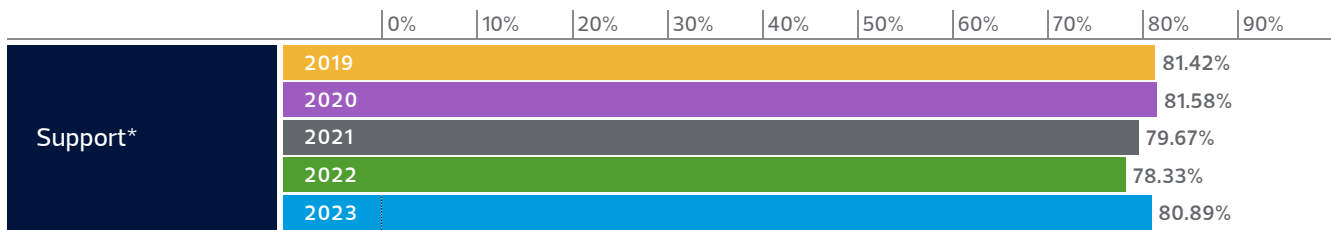
*The managing director level was added in calendar year 2023.



INCLUSION IMPACT



*FCS stands for firm client servers. These are individuals who serve our firm in an internal capacity (e.g., finance, marketing, sales, human resources, information technology, risk management, etc.). FCS professionals include those in the associate, senior associate and manager levels.

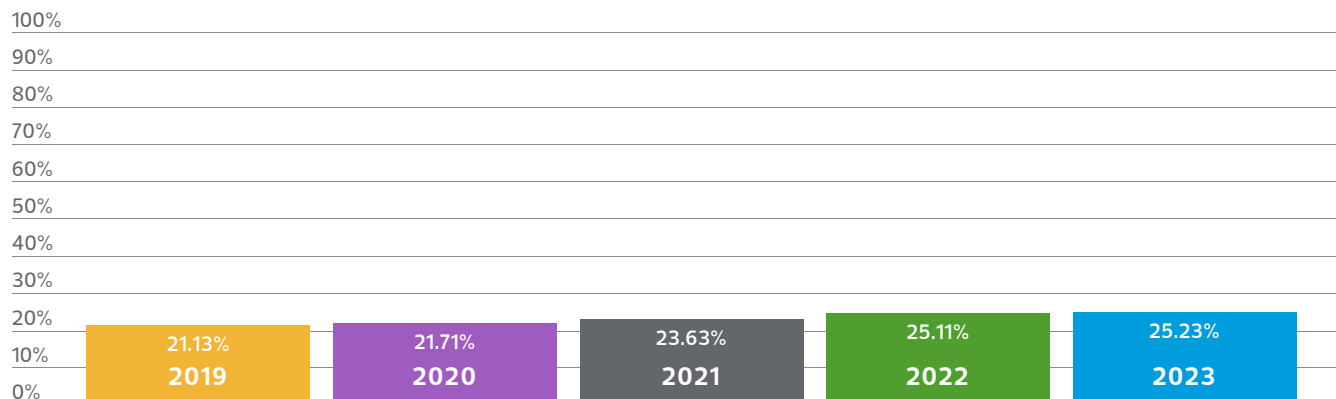


Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

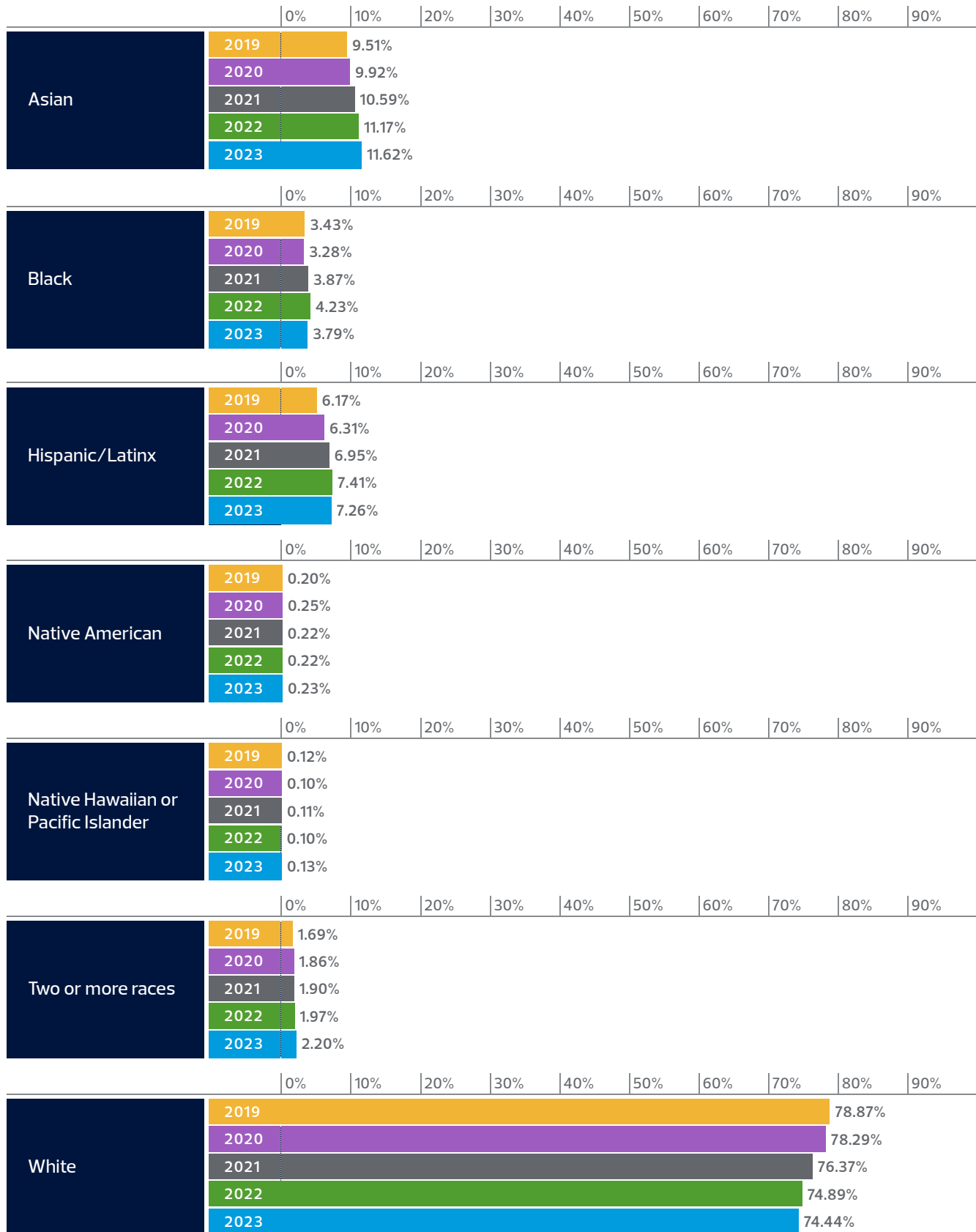
Racial and ethnic diversity

Our continued growth in ethnic and racial diversity reflects our commitment to an inclusive environment for all. We continue to advance our highly qualified professionals of all backgrounds into partner and principal roles, and we continue to see positive trends in the diversity of our talent pipeline at many other levels.

Percentage of racially and ethnically diverse professionals

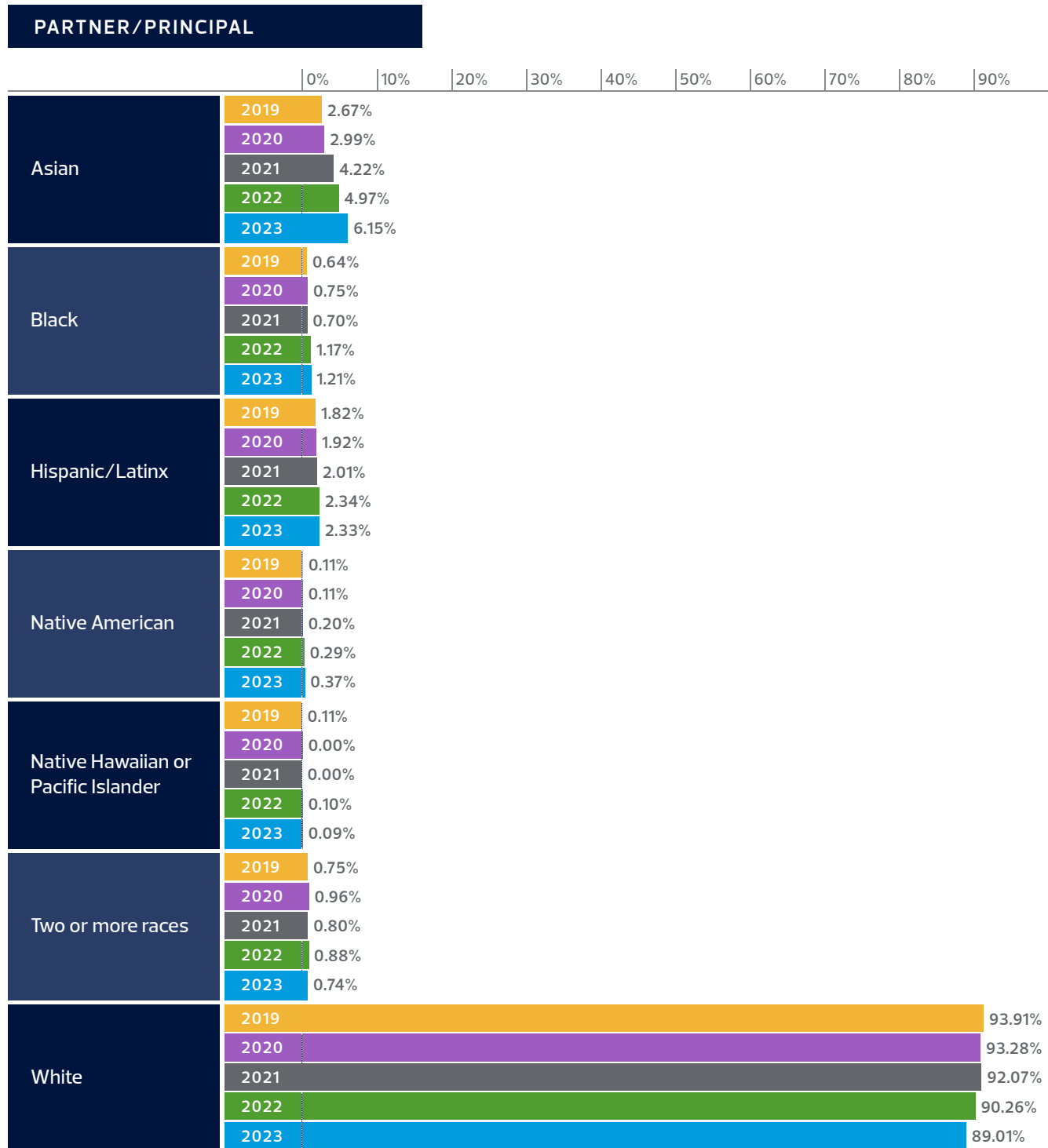


Race and ethnicity representation as a percentage—calendar years 2019–23



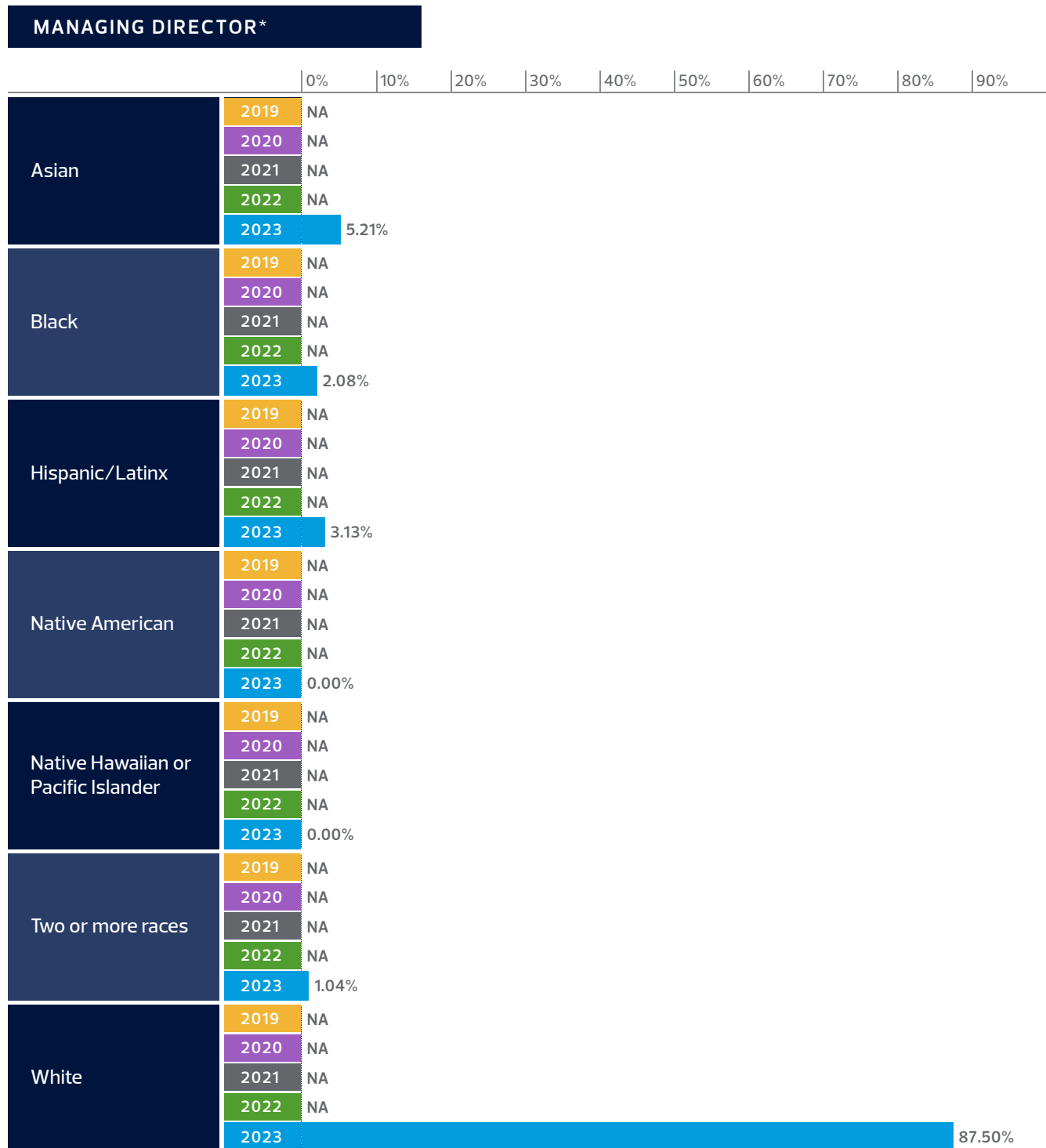
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Representation as a percentage by level—calendar years 2019–23



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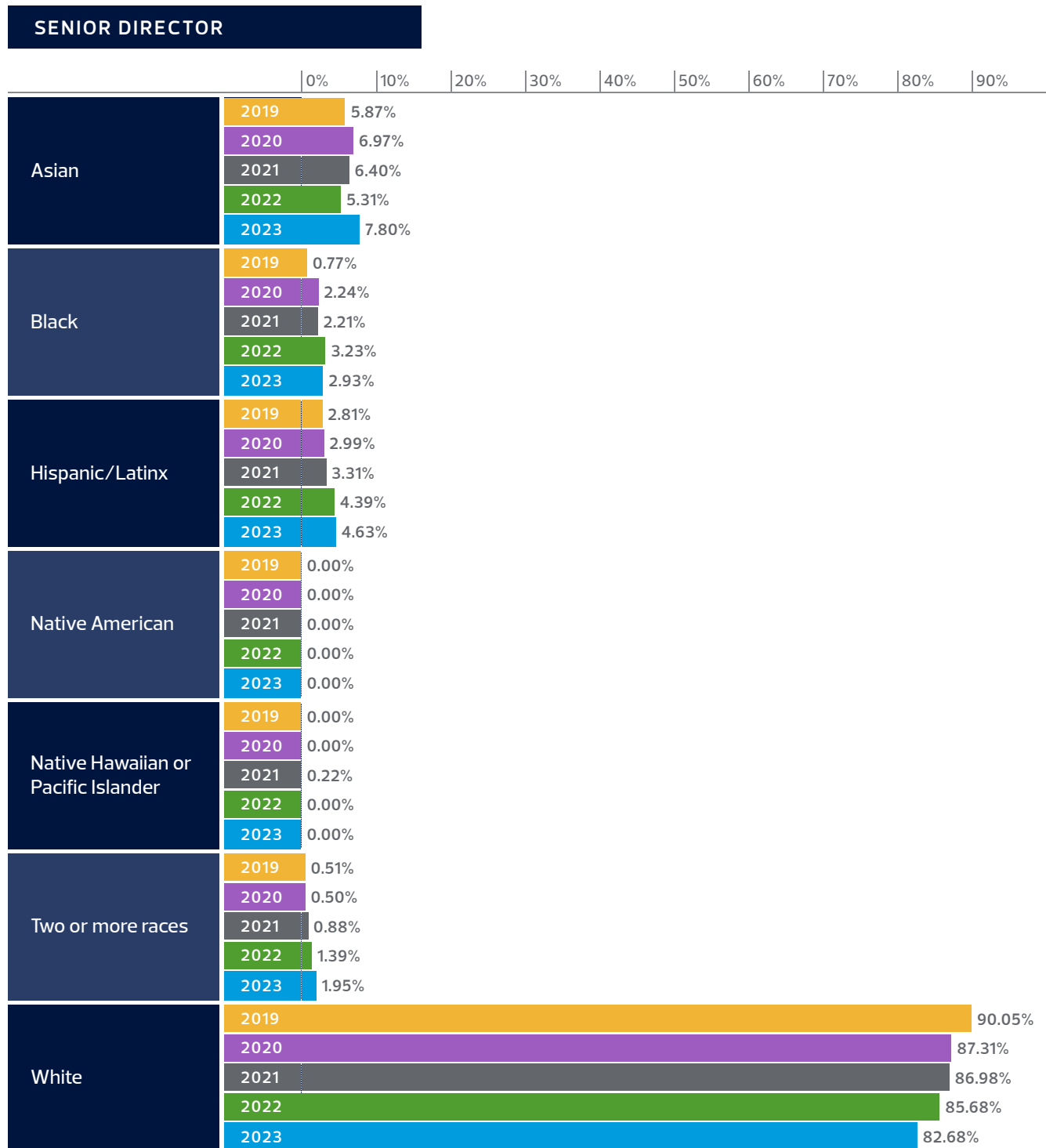
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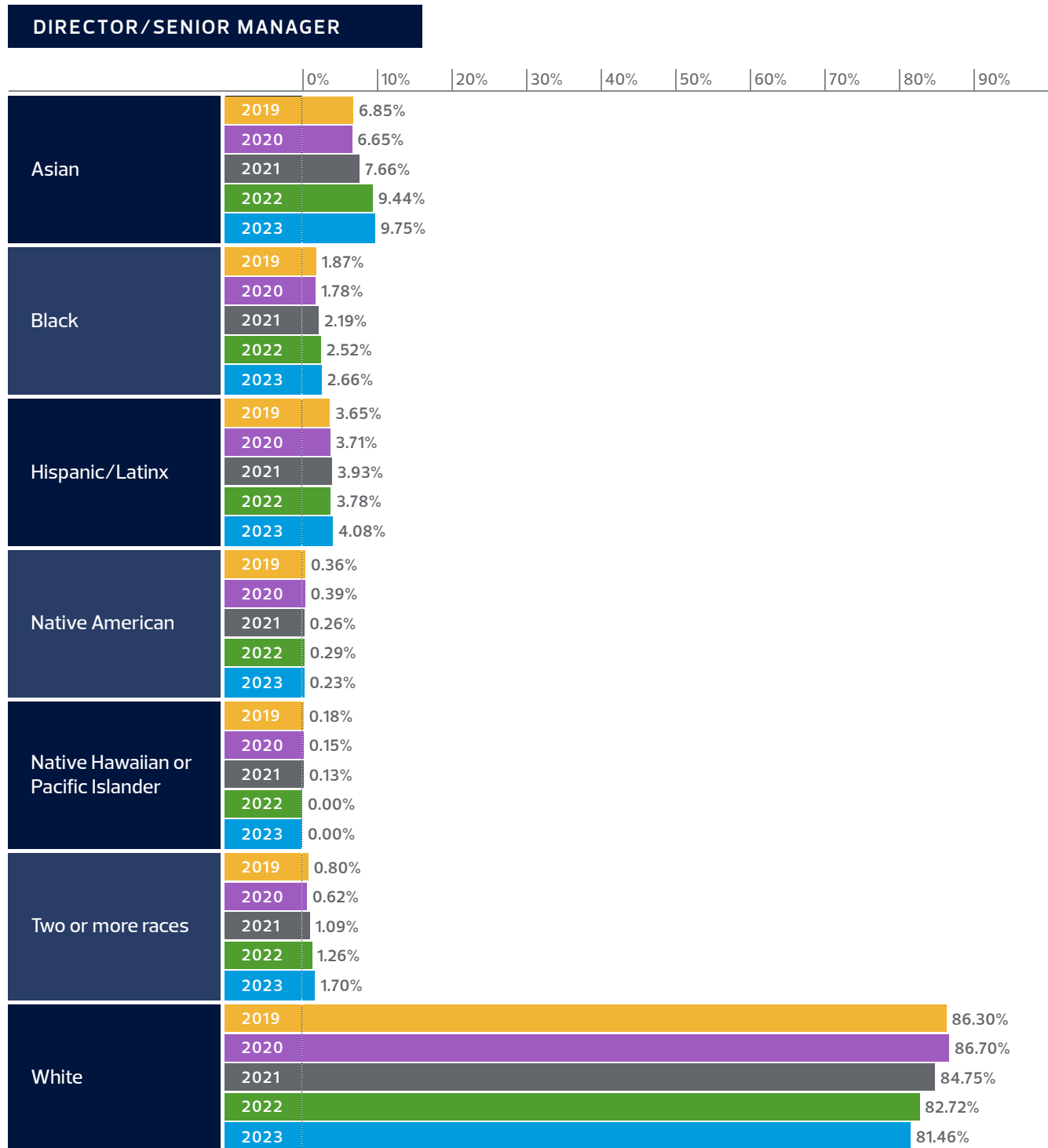
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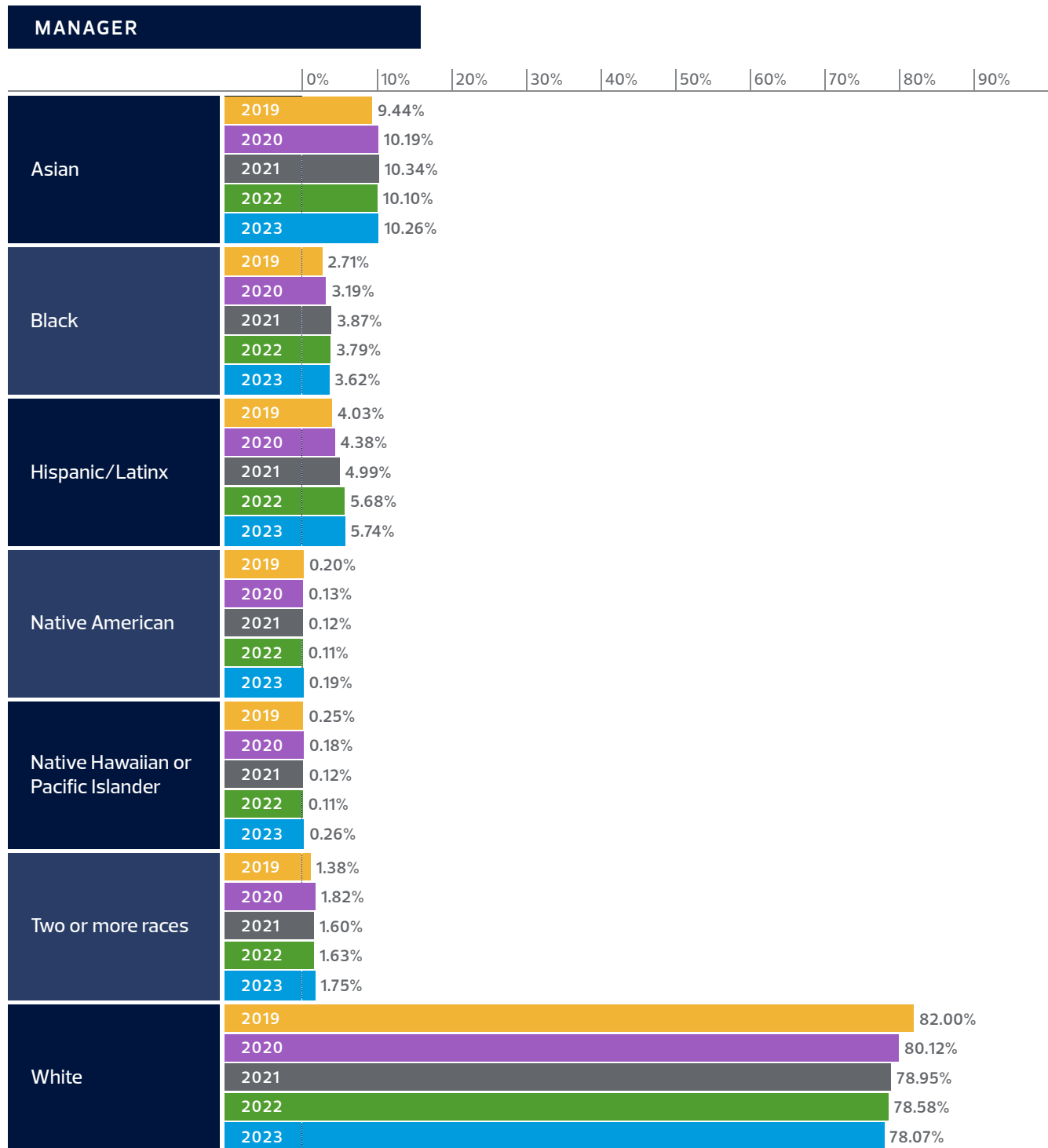
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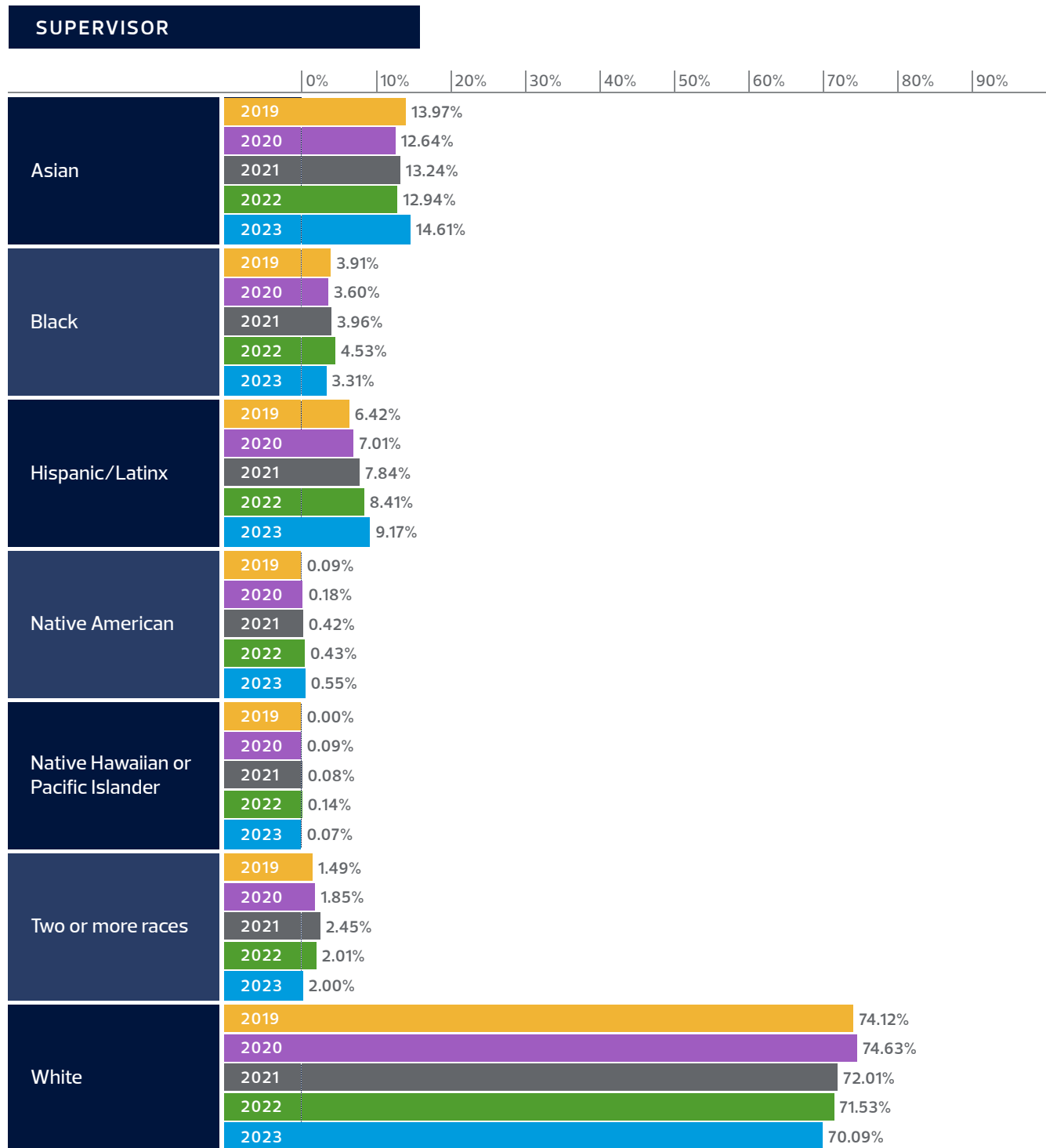
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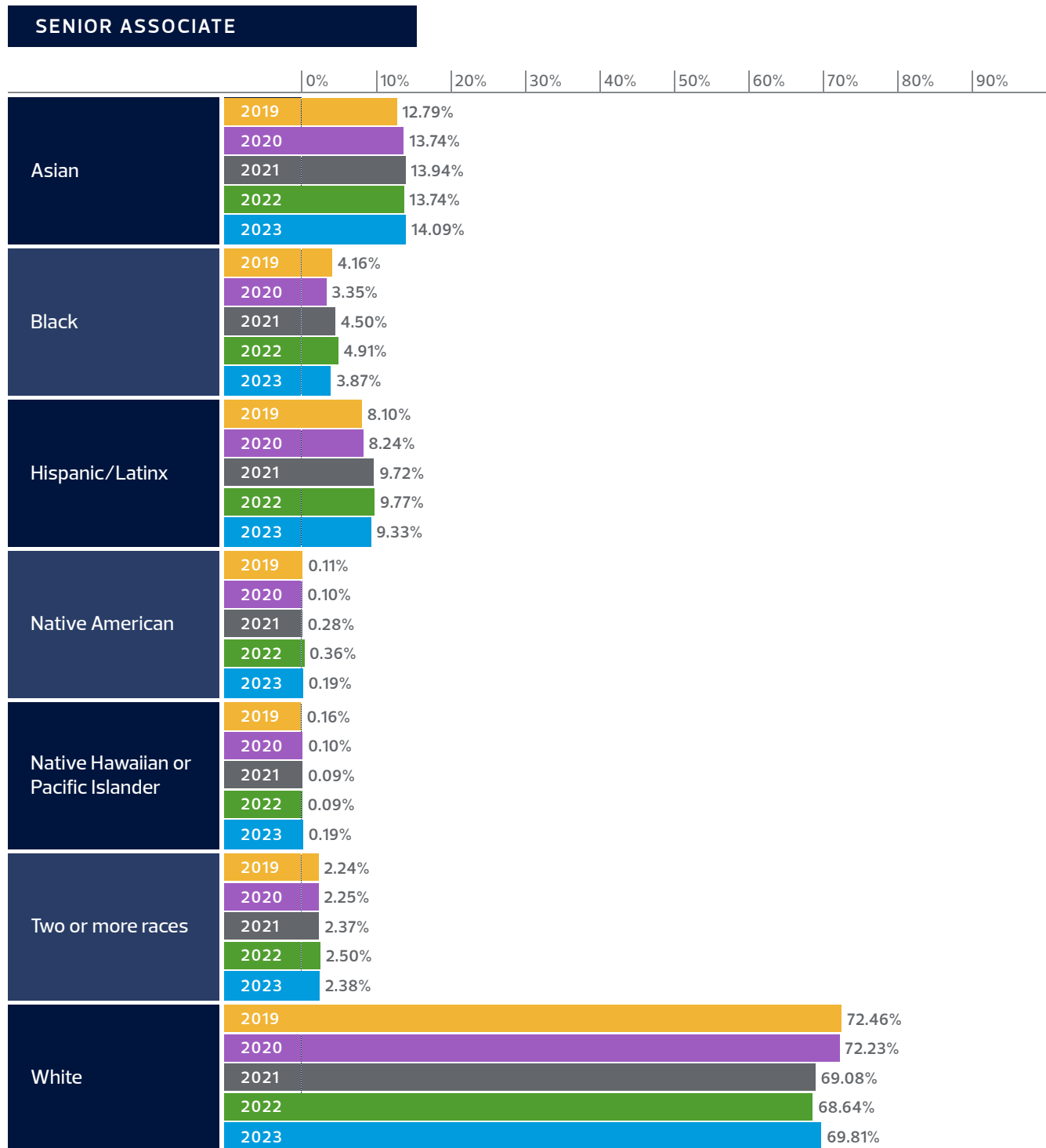
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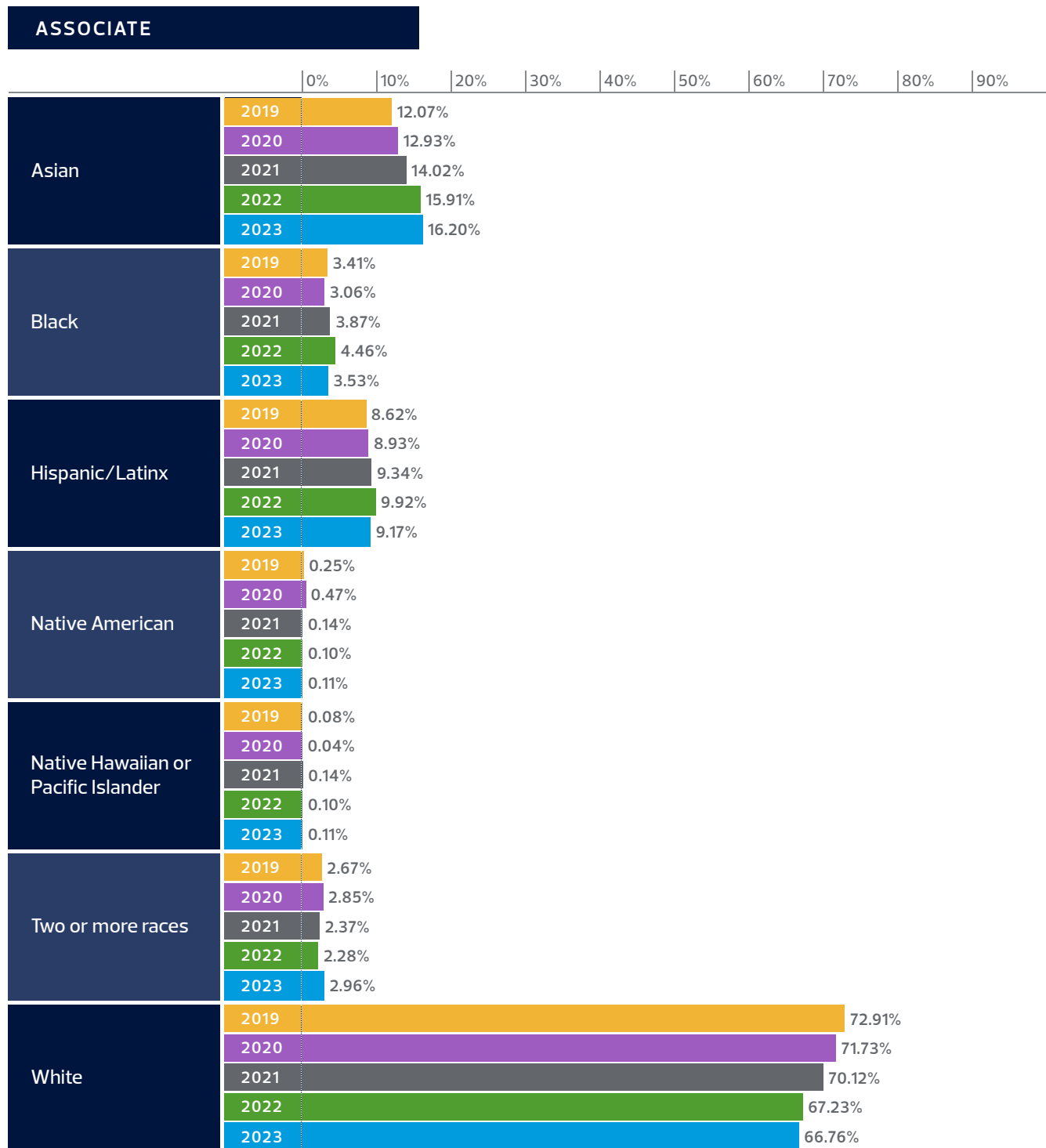
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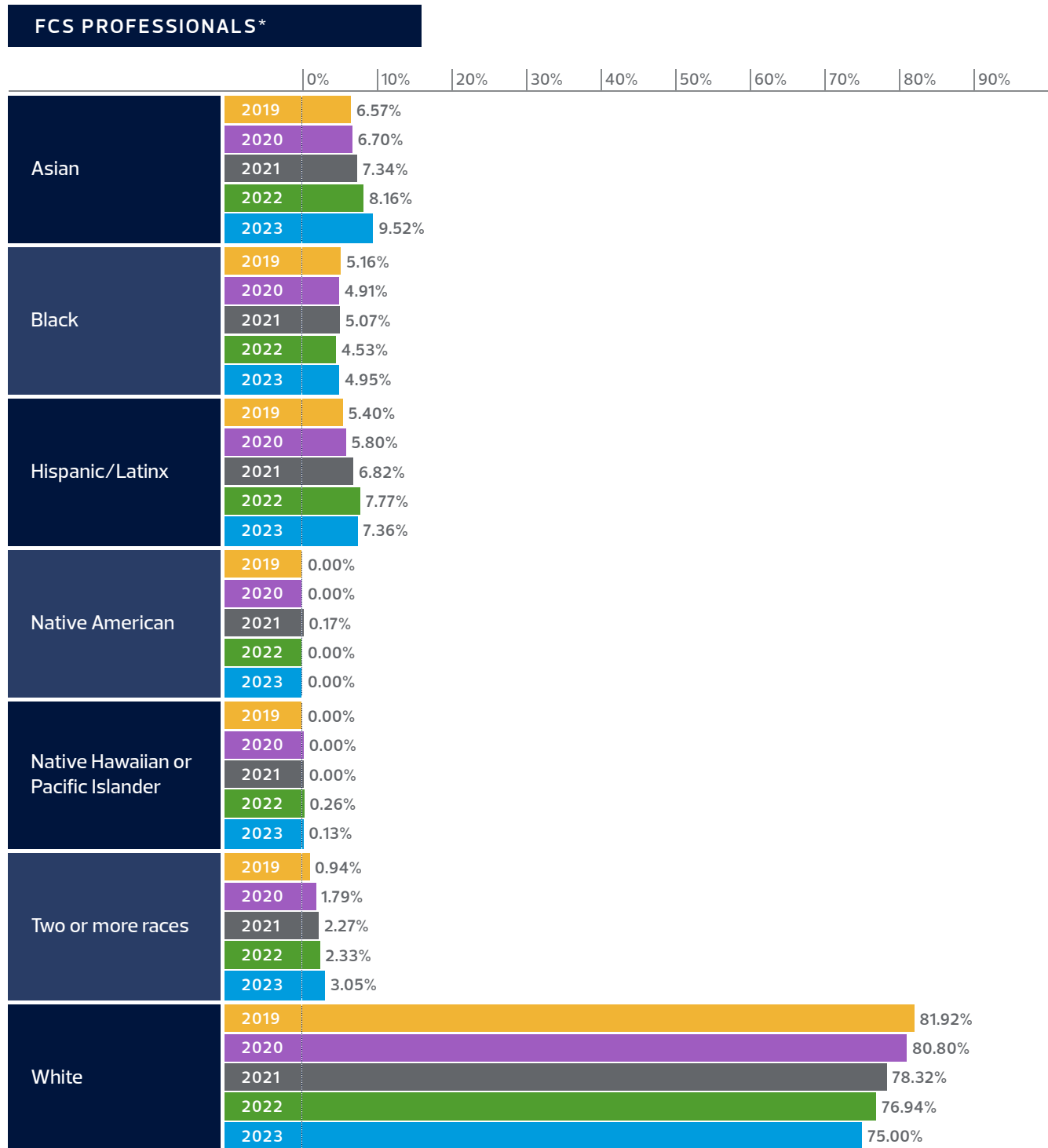
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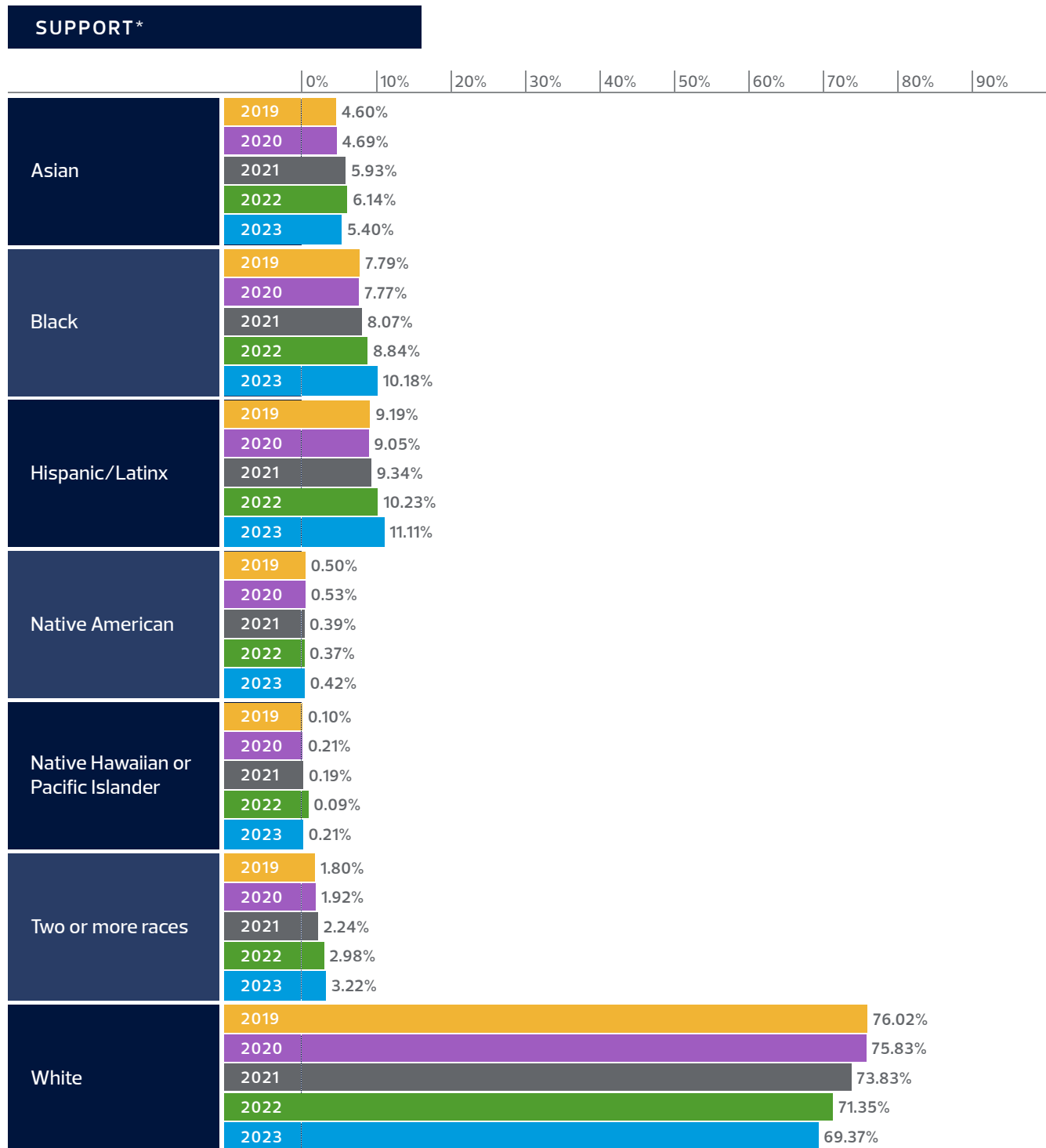
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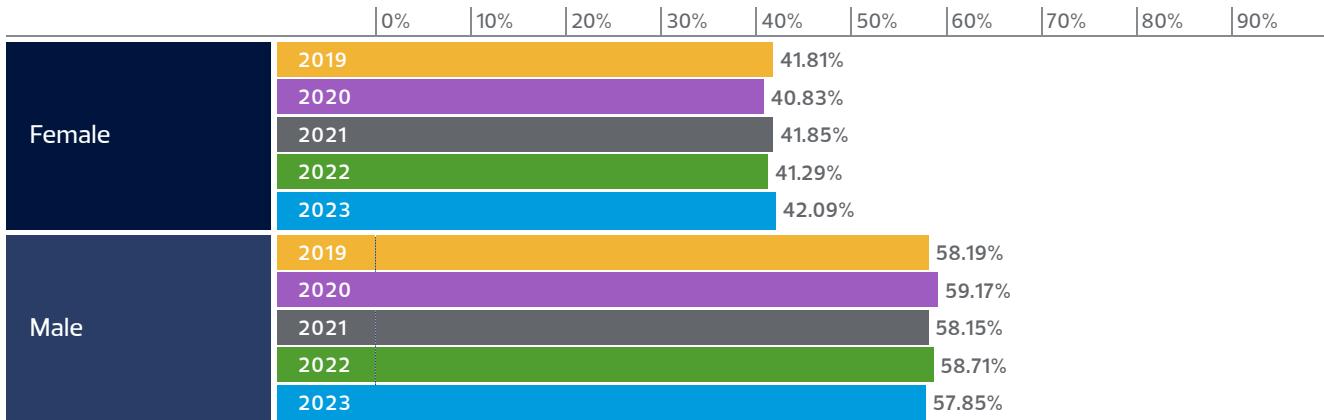
*Includes FCS specialist, senior specialist, associates and client service representatives.

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Interns

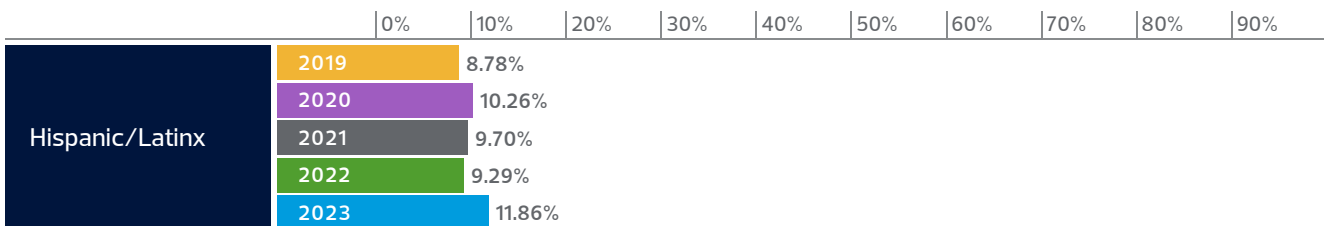
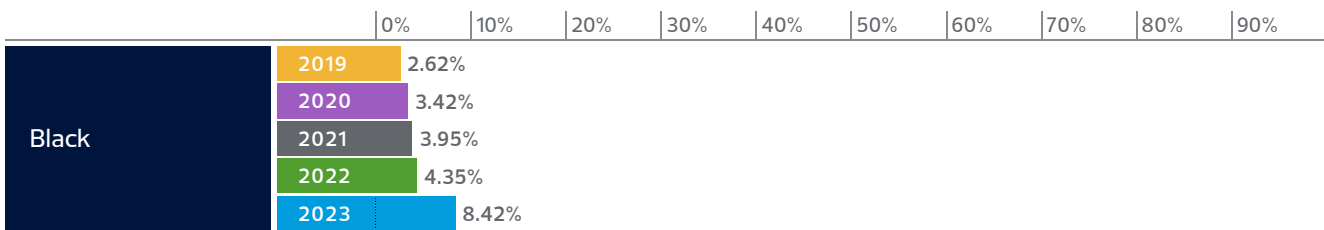
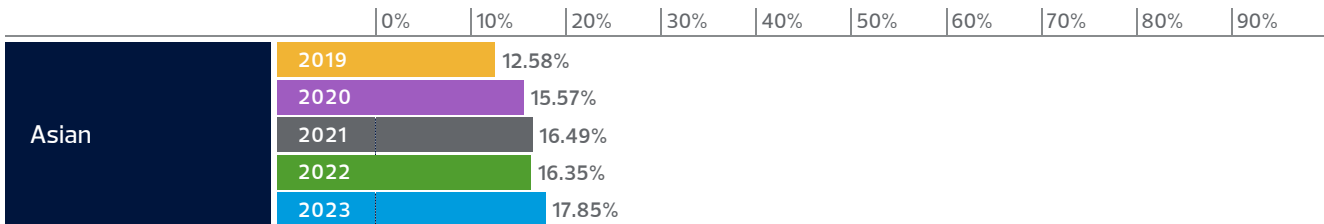
Our pipeline of interns also reflects our commitment to creating an inclusive workplace now and into the future. Interns of all backgrounds continue to bring new perspectives and talent to our organization.

Intern representation as a percentage—calendar years 2019–23

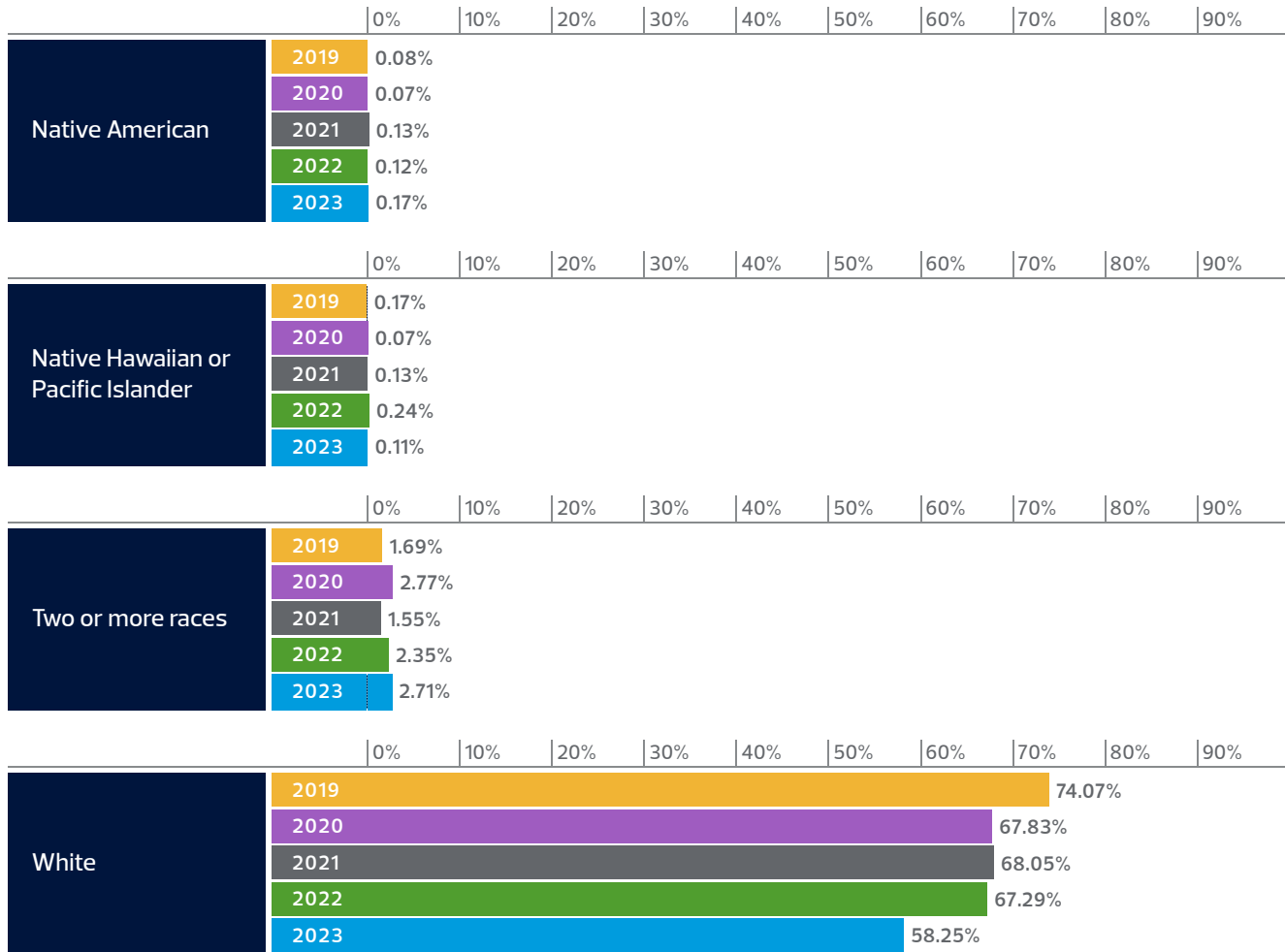


Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

Percentage of interns, racially and ethnically diverse—calendar years 2019–23



INCLUSION IMPACT

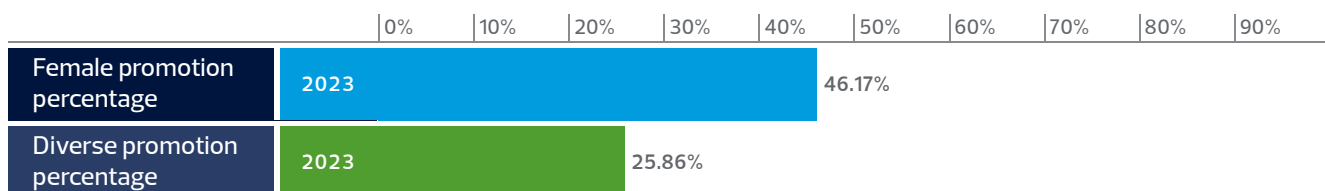


Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

Retention and advancement

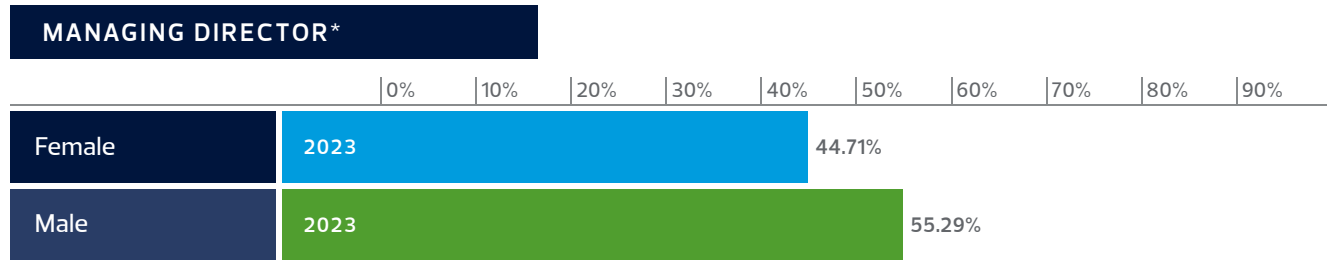
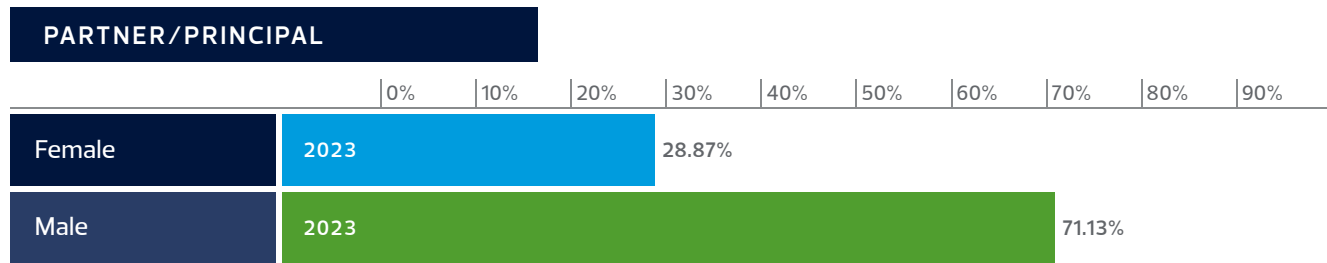
Retention and advancement is a key component of creating an inclusive workplace. Over the past five years, we have continued to make progress toward providing fair and equitable opportunities for all of our people and remain committed to fostering an inclusive workplace that supports the communities where our people live and work.

Percentage of promoted individuals—calendar year 2023

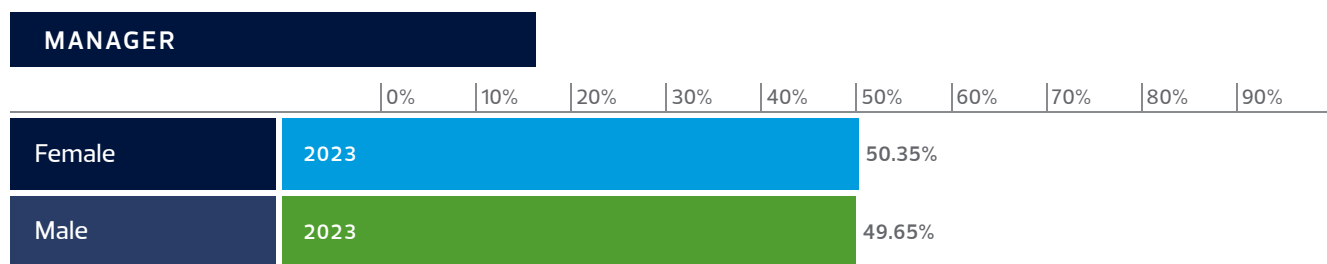
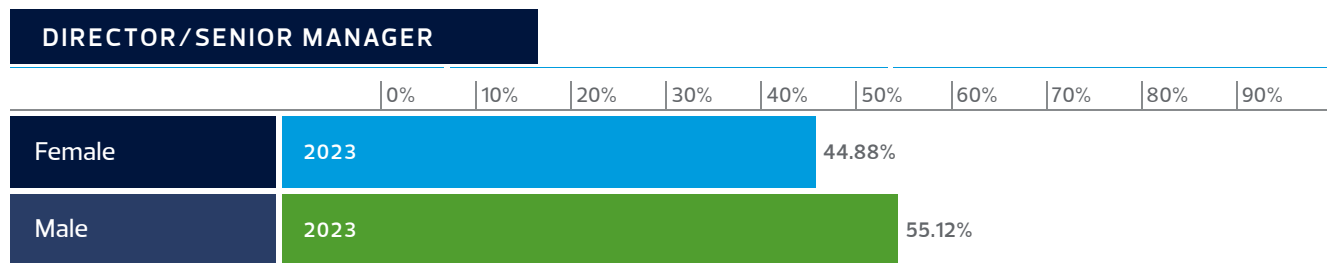
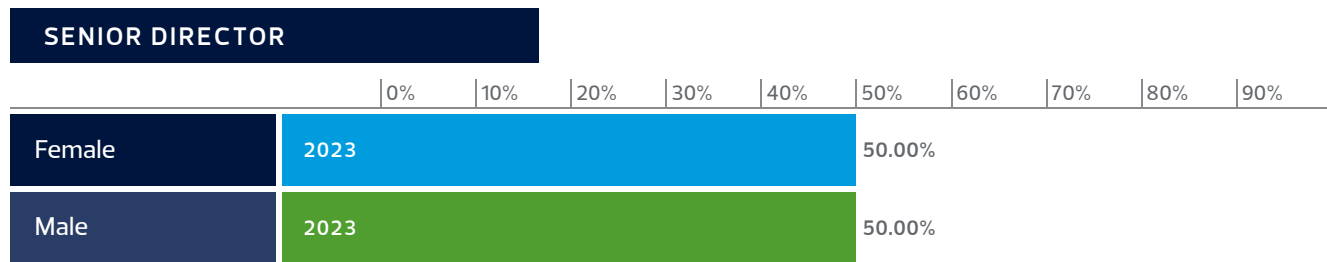


Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

Percentage of promotion, female and male by level—calendar year 2023

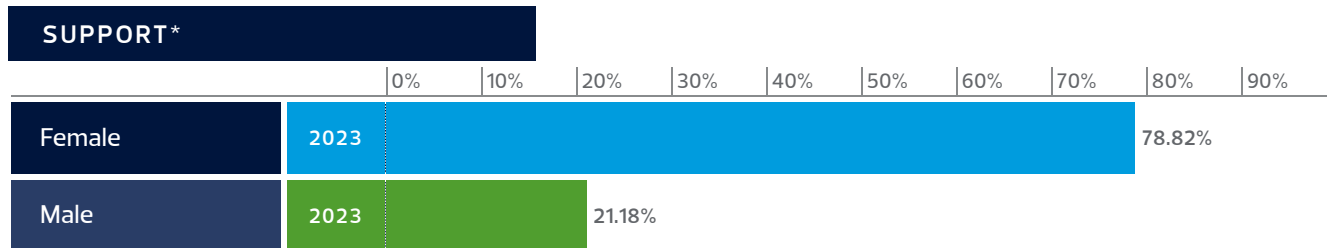
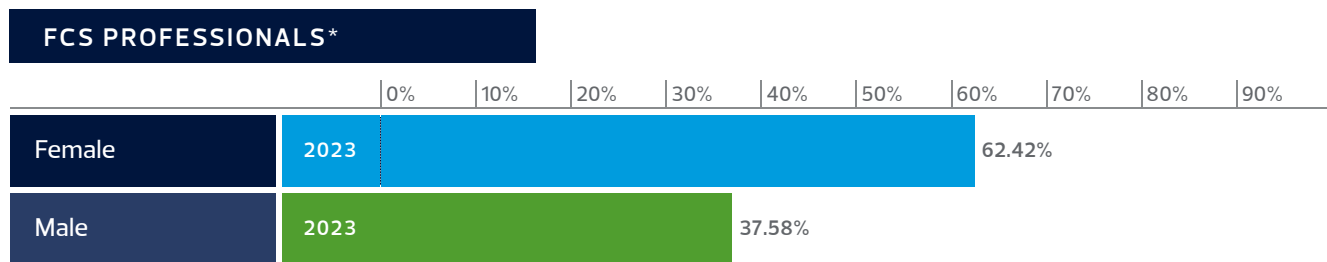
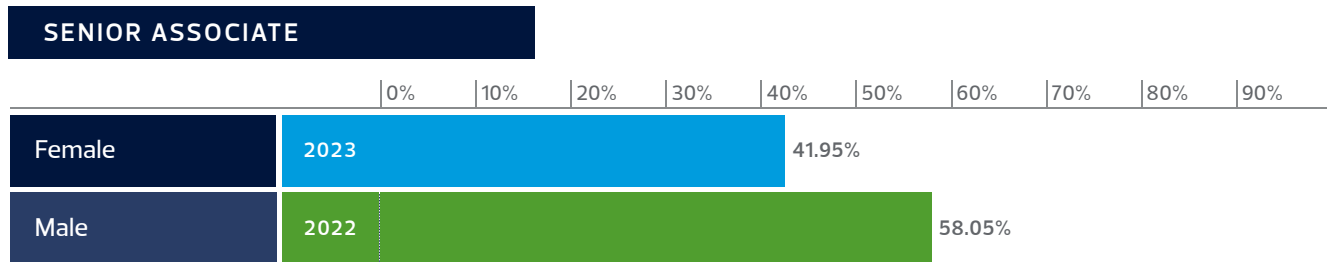
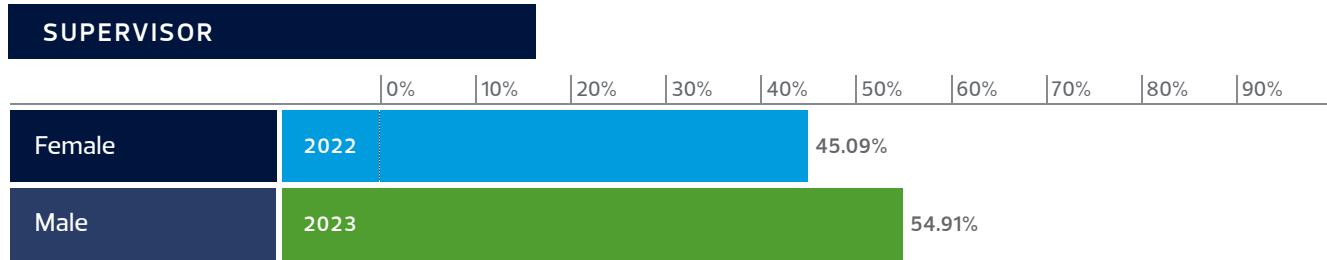


*The managing director level was added in calendar year 2023.



Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

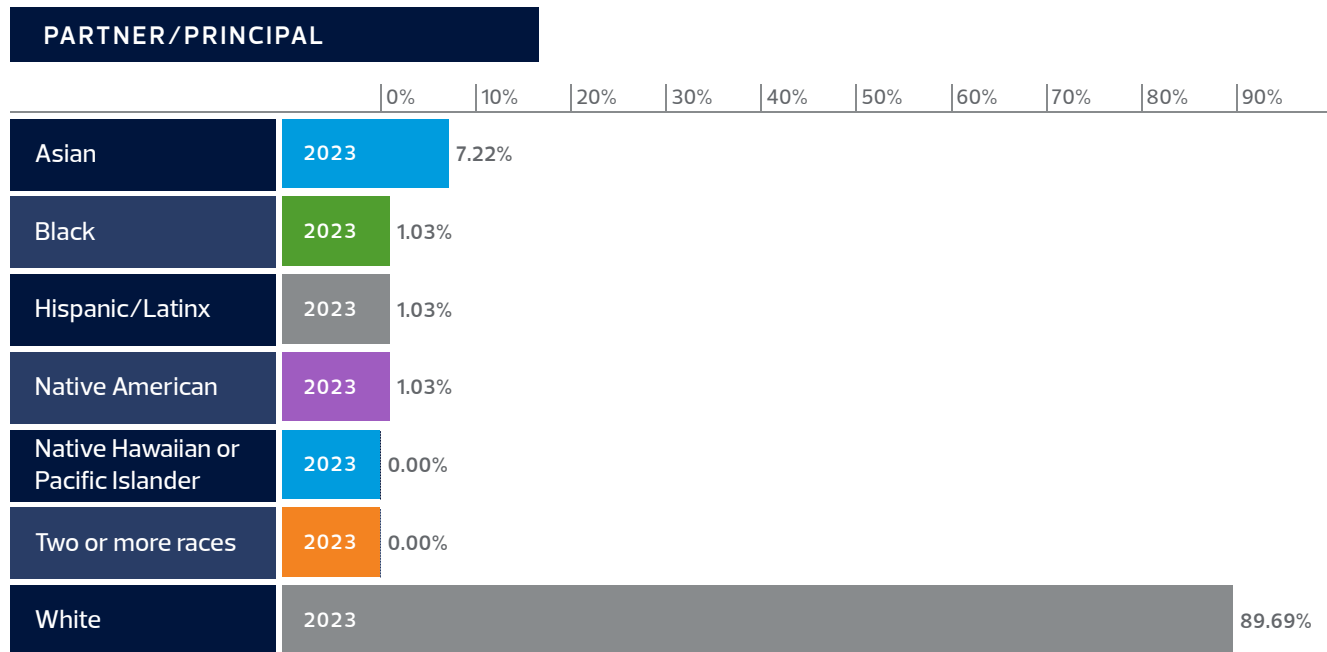
INCLUSION IMPACT



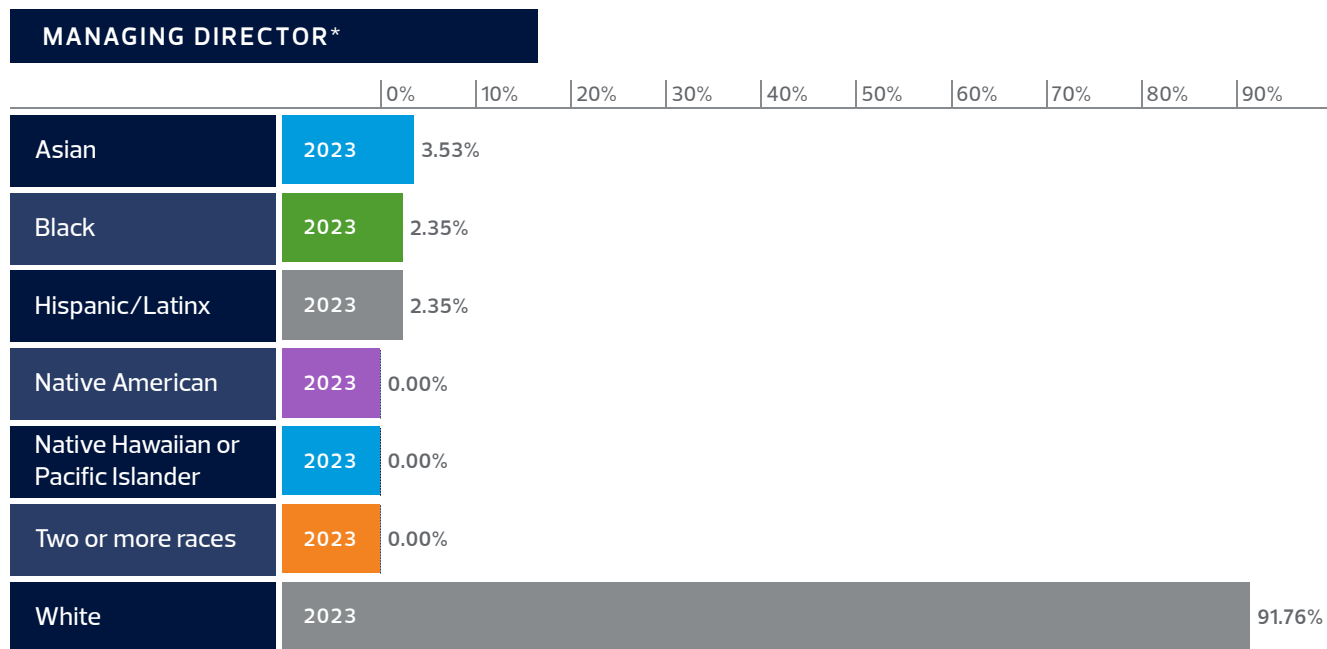
*Includes FCS specialist, senior specialist, associates and client service representatives.

Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

Percentage of promotions, racially and ethnically diverse—calendar year 2023



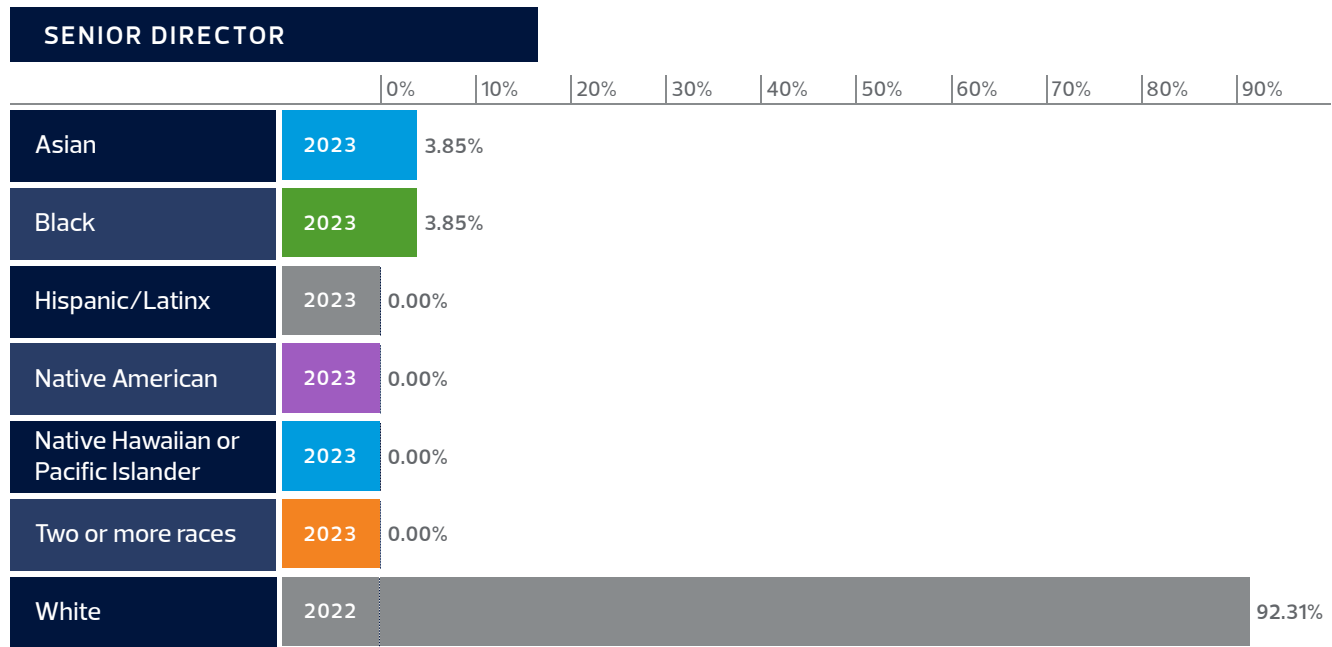
Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.



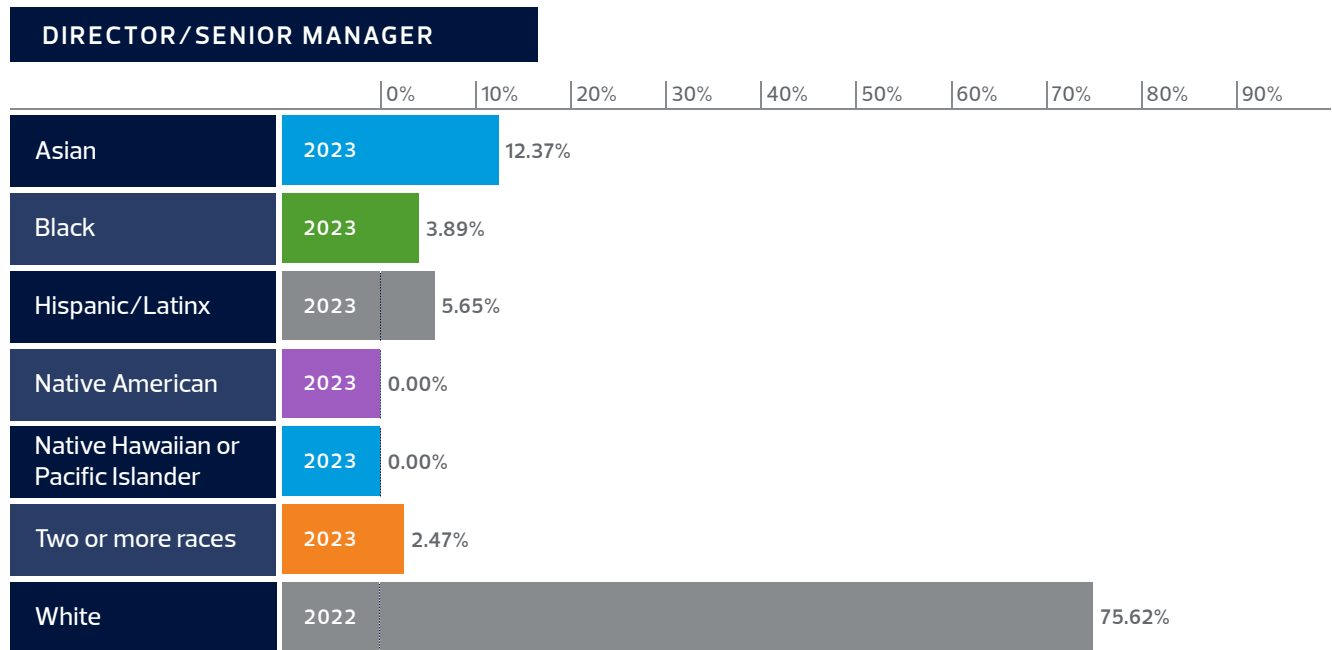
*The managing director level was added in calendar year 2023.

Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

INCLUSION IMPACT

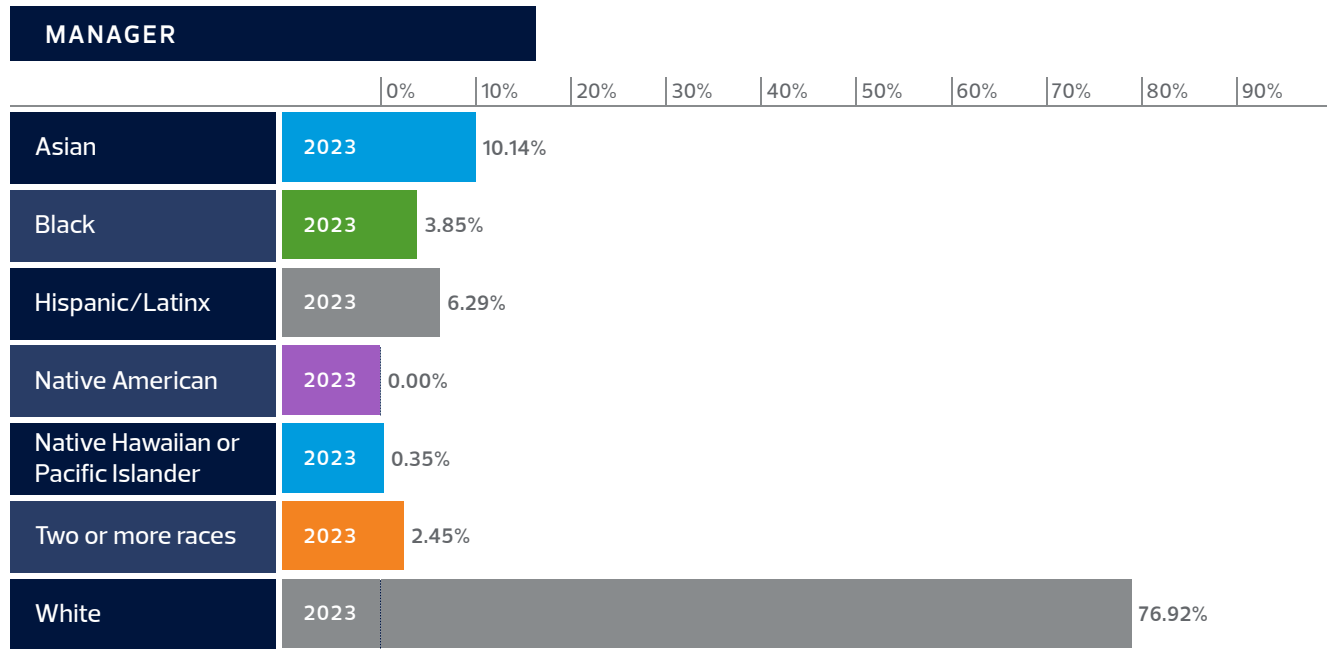


Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

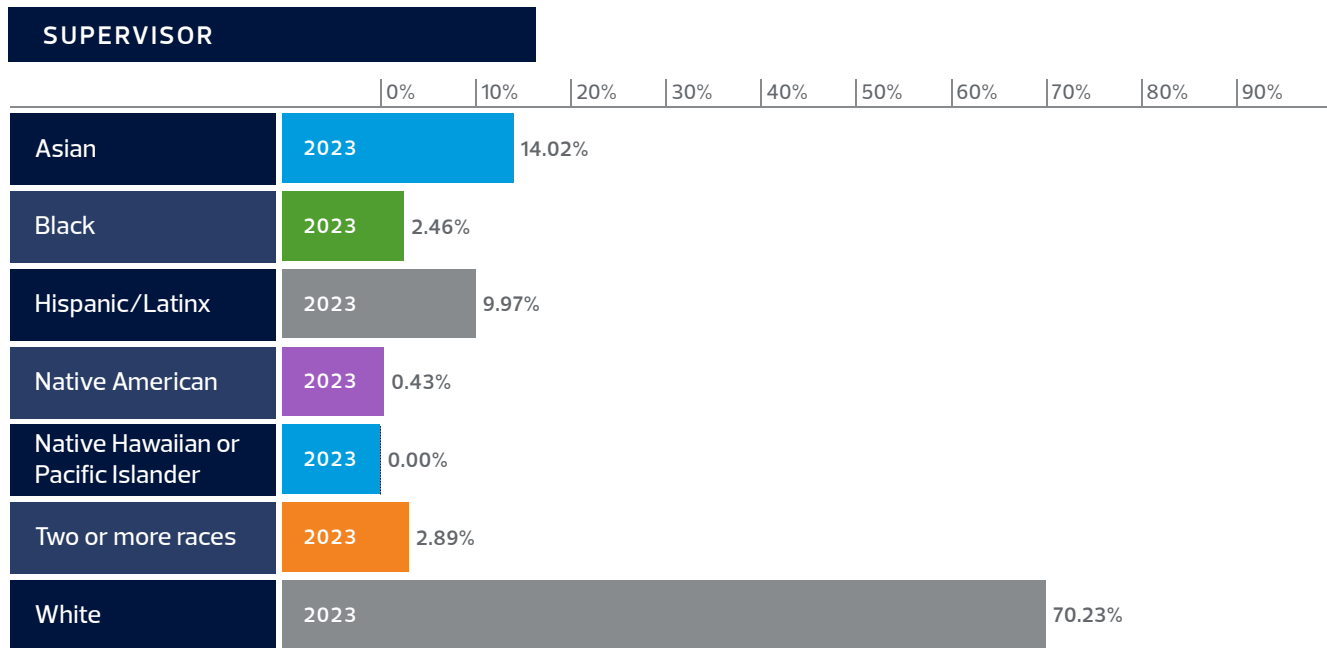


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INCLUSION IMPACT

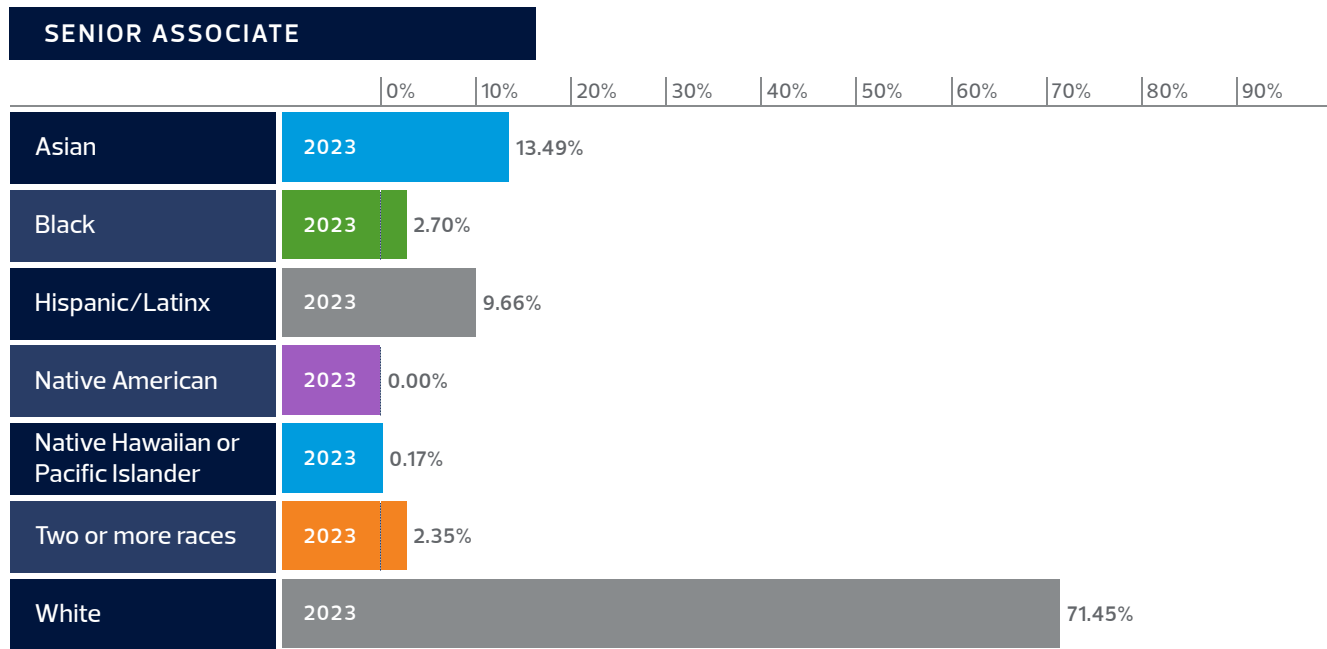


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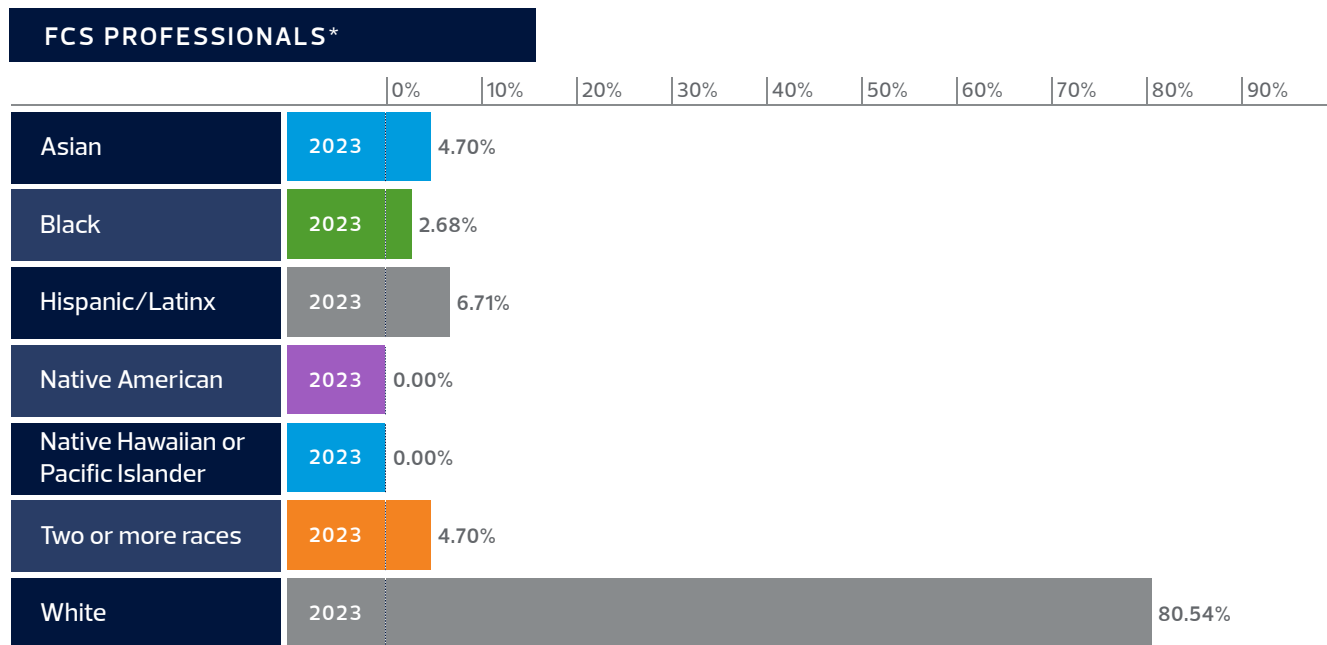


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INCLUSION IMPACT



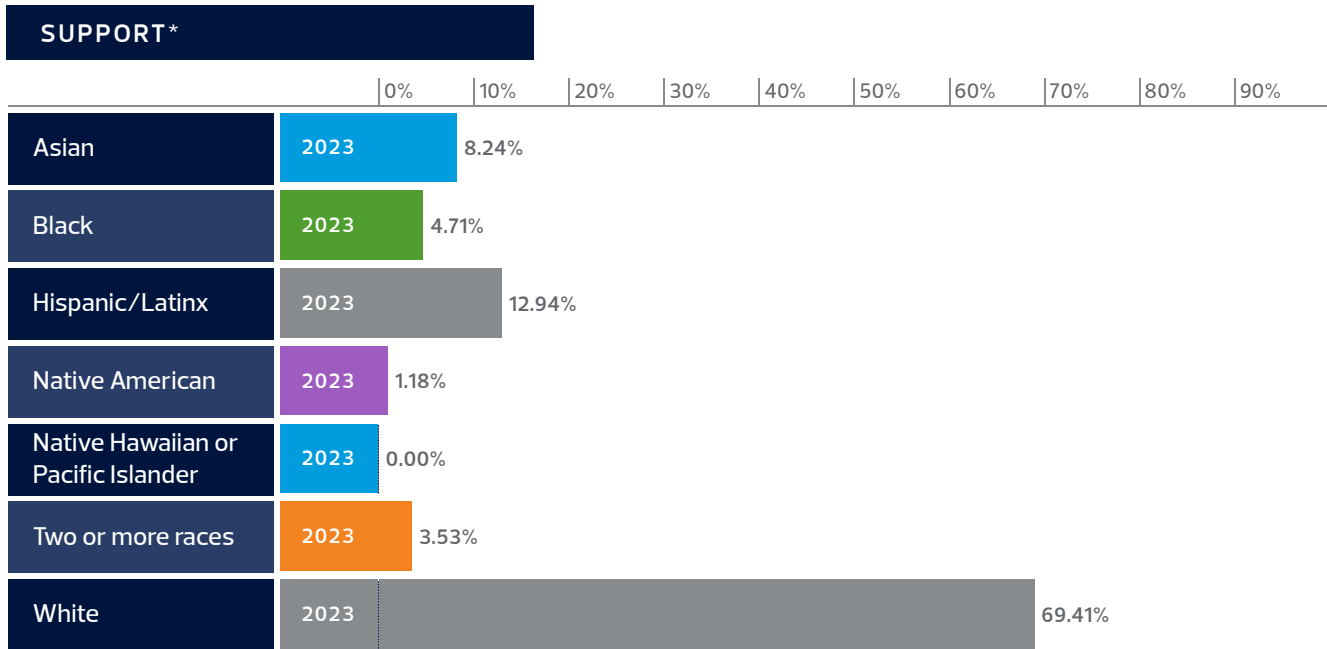
Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.



*FCS stands for firm client servers. These are individuals who serve our firm in an internal capacity (e.g., finance, marketing, sales, human resources, information technology, risk management, etc.). FCS professionals include those in the associate, senior associate and manager levels.

Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

INCLUSION IMPACT



Note: Less than 1% of RSM team members elected not to provide their gender or ethnicity. Those individuals are excluded from the statistical summaries provided in this report. Therefore, some numbers will not add to 100%.

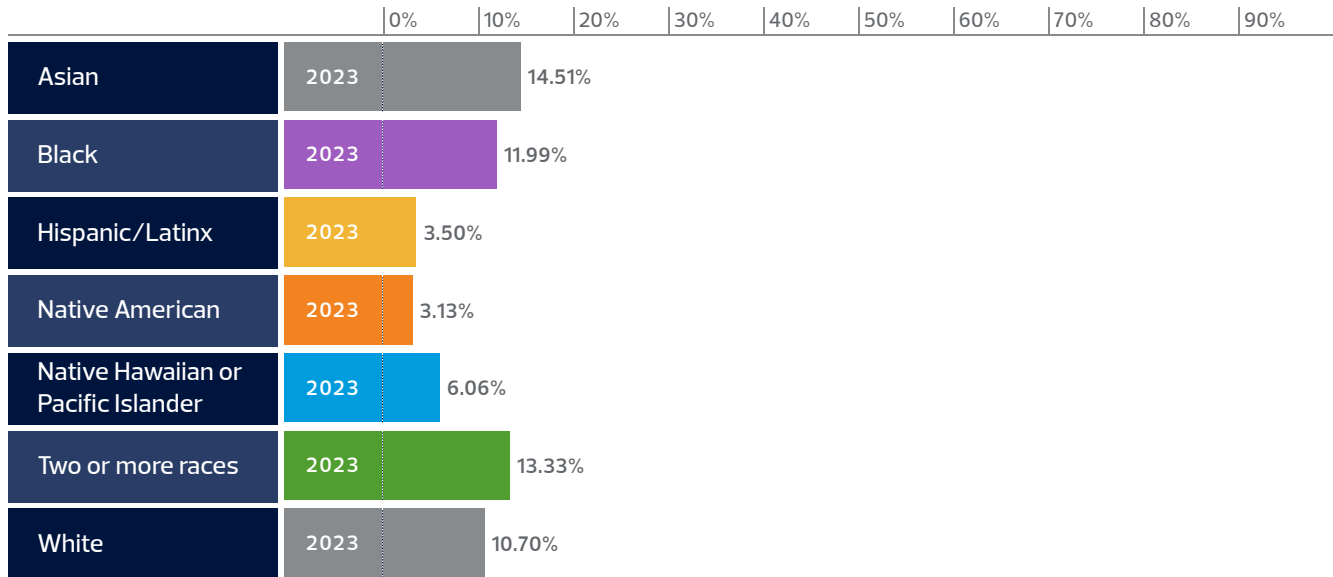
Total voluntary turnover as a percentage of total workforce—calendar year 2023

11.52%

Voluntary turnover as a percentage for each of the following sub-groups—calendar year 2023

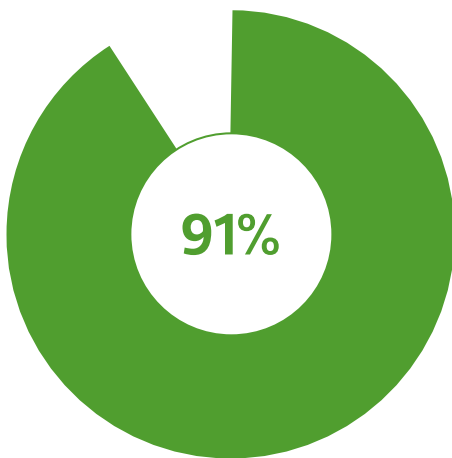


Voluntary turnover as a percentage for each of the following sub-groups—calendar year 2023

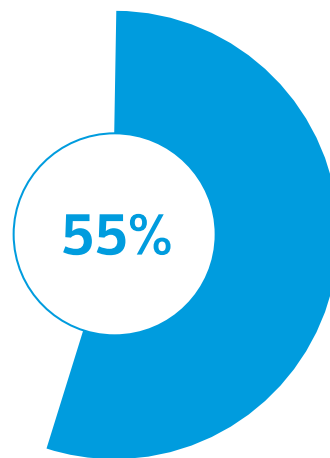


Employee network groups

Our employee network groups (ENGs) are a foundational component for advancing and retaining professionals of all backgrounds. We continue to see strong participation in our ENGs with 91% of our partners and principals and 55% of our people involved in one or more ENGs.



Partner/principal members of employee network groups



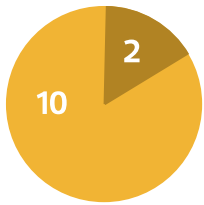
Total employee network group membership

Board and leadership

At RSM, inclusivity starts at the top.that supports the communities where our people live and work.

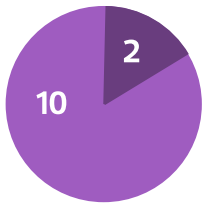
RSM US LLP Board of Directors

The RSM US LLP Board of Directors is the governing body of the firm. It is composed of the firm's managing partner and CEO and 12 partners and principals who are elected by their fellow owners to serve four-year terms. A chairperson is elected annually by the board.



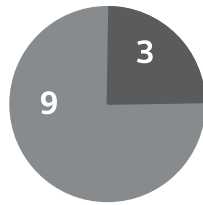
2019

● Racially/ethnically diverse
● White



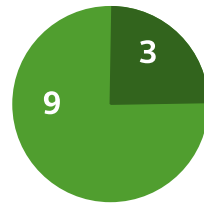
2020

● Racially/ethnically diverse
● White



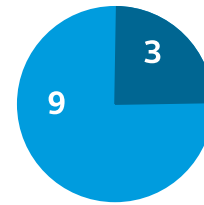
2021

● Racially/ethnically diverse
● White



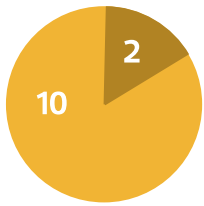
2022

● Racially/ethnically diverse
● White



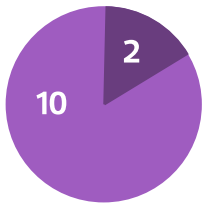
2023

● Racially/ethnically diverse
● White



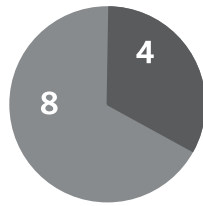
2019

● Women
● Men



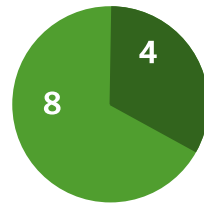
2020

● Women
● Men



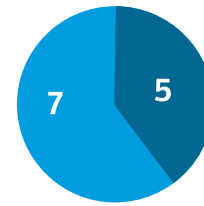
2021

● Women
● Men



2022

● Women
● Men

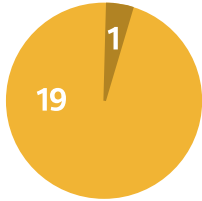


2023

● Women
● Men

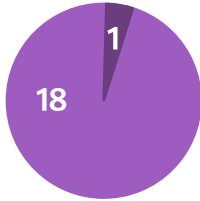
RSM US LLP leadership team

The firm's leadership team is responsible for setting the firm's strategy and annual operating plan.



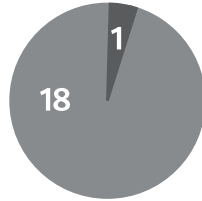
2019

● Racially/ethnically diverse
● White



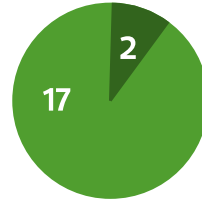
2020

● Racially/ethnically diverse
● White



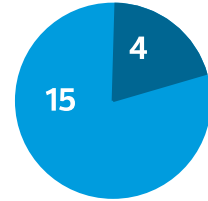
2021

● Racially/ethnically diverse
● White



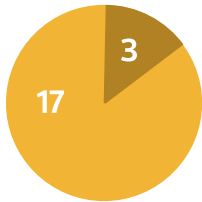
2022

● Racially/ethnically diverse
● White



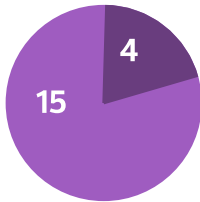
2023

● Racially/ethnically diverse
● White



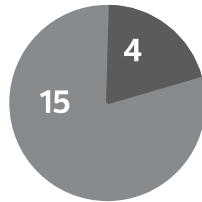
2019

● Women
● Men



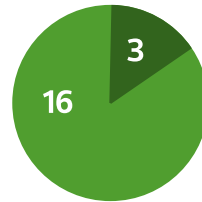
2020

● Women
● Men



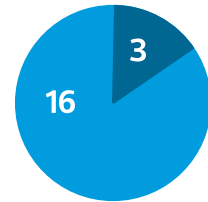
2021

● Women
● Men



2022

● Women
● Men



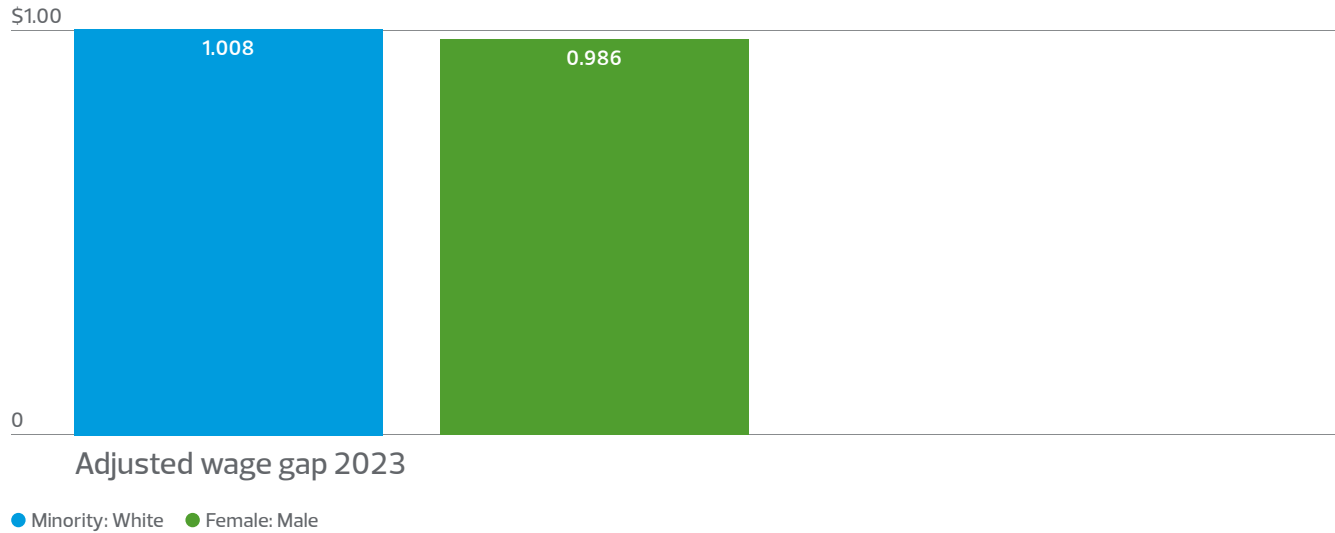
2023

● Women
● Men

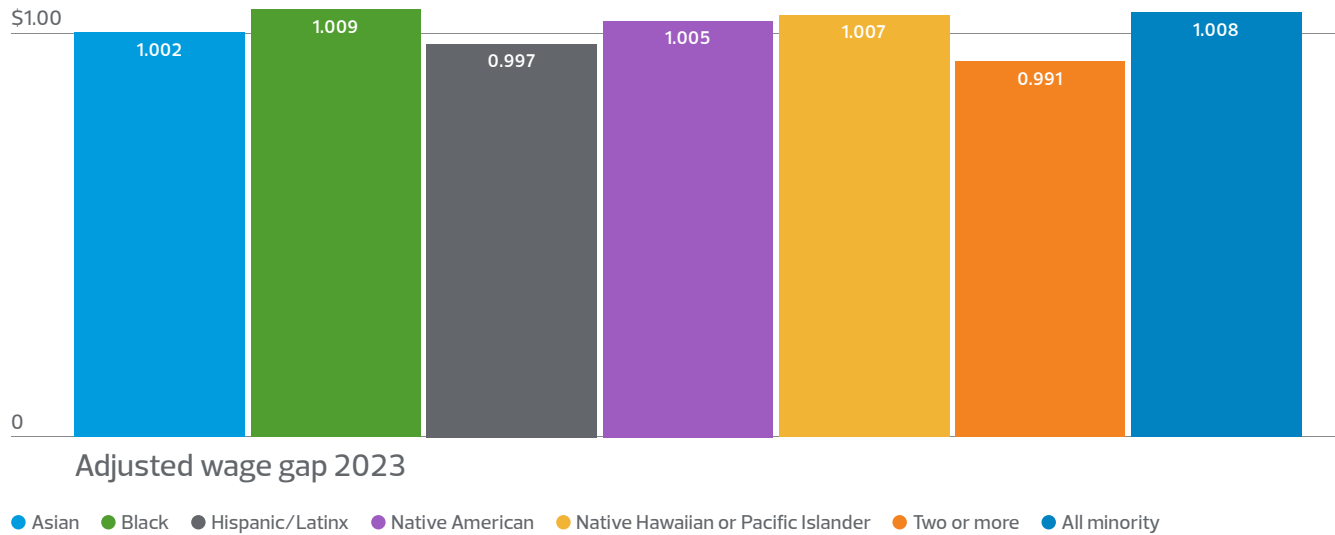
Pay equity

We are proud to share that, once again, our wage gap analysis showed equity or near equity for our professionals across gender and ethnicity.

Comparison



Comparison



Big picture: What the numbers say

As our five-year snapshot demonstrates, we have a longstanding commitment to inclusion, and we remain focused on creating a well-rounded and supportive workplace for our professionals. Embracing the value of including professionals from a wide range of backgrounds ensures that we can provide the highest level of service to our clients.

2023 featured impacts



Over the last 10 years, we have made great progress toward fostering an inclusive culture and sharing our knowledge, beliefs and values to make a positive difference in our communities.

Highlights of our FY24 inclusion efforts

Hiring our Heroes

RSM works with Hiring Our Heroes (HOH), which assists military veterans and spouses with the unique challenges of transitioning to civilian careers, providing tailored programs and services. Through the collaboration, RSM has access to HOH's network of more than 200,000 military personnel and spouses. RSM's VALOR employee network group (ENG) group for military-affiliated employees works closely with RSM's recruitment team and any HOH candidates to ensure they understand the support and community they'll have when they join the firm. Through this initiative, RSM reinforces its position as an organization dedicated to supporting veterans and spouses in their transition to civilian employment.



RSM delegates at a Hiring Our Heroes career summit.

Women leaders meeting

We hosted the next-generation women leaders meeting, bringing together more than 150 attendees from the U.S., Canada, India and El Salvador to advance RSM's commitment to developing and retaining women leaders. Over two days, participants networked, listened, learned, contributed and collaborated with a focus on instilling confidence in a world of change. The conversations are continuing through follow-up sessions with firm leaders and cohort groups.



RSM's 2023 next-generation women's leader meeting.

10th annual leadership summit

This year's leadership summit brought together firm leaders and leaders of our inclusion activities to continue to build their skills, discuss emerging topics and connect with one another. The theme was "Level up: Igniting the power of inclusion." As we look ahead, we shared our strategy to take our culture of inclusion to the next level by focusing on three "BIG" priorities:

- Business alignment
- Inclusion for all
- Growth enablement

We also announced RSM's annual IMPACT awards, which recognize individuals for their actions, efforts and contributions to inclusion in the areas of innovation, management, persistence, client focus and talent focus.

Next-generation task force

This year, we launched the ENG next-generation taskforce comprised of junior ENG members who were nominated by ENG leaders. The taskforce provides leadership opportunities for emerging leaders, a forum for sharing insights and perspectives, and a place to cultivate innovative solutions to business challenges.

Professional organizations

We work with key professional organizations, societies and associations to support inclusion and professional development and to enrich our workforce. Nationally, we have made substantial investments in the [National Association of Black Accountants](#), the [Association of Latino Professionals For America](#), the [National Association of Asian Professionals Convention, Out & Equal](#) (an organization that promotes LGBTQ+ workplace equality), the [Global Leadership Summit](#) (faith-based leadership training), the [AICPA Women's Global Leadership Summit](#), [Student Veterans of America](#), and [Disability: IN](#), as well as accounting-focused colleges, universities and students. We also have active relationships with organizations focused on supporting veterans and their families. In addition to firmwide investments, we sponsor our people's membership and participation in organizations like [Ascend](#) (a Pan-Asian organization for business professionals) and others.

By the numbers



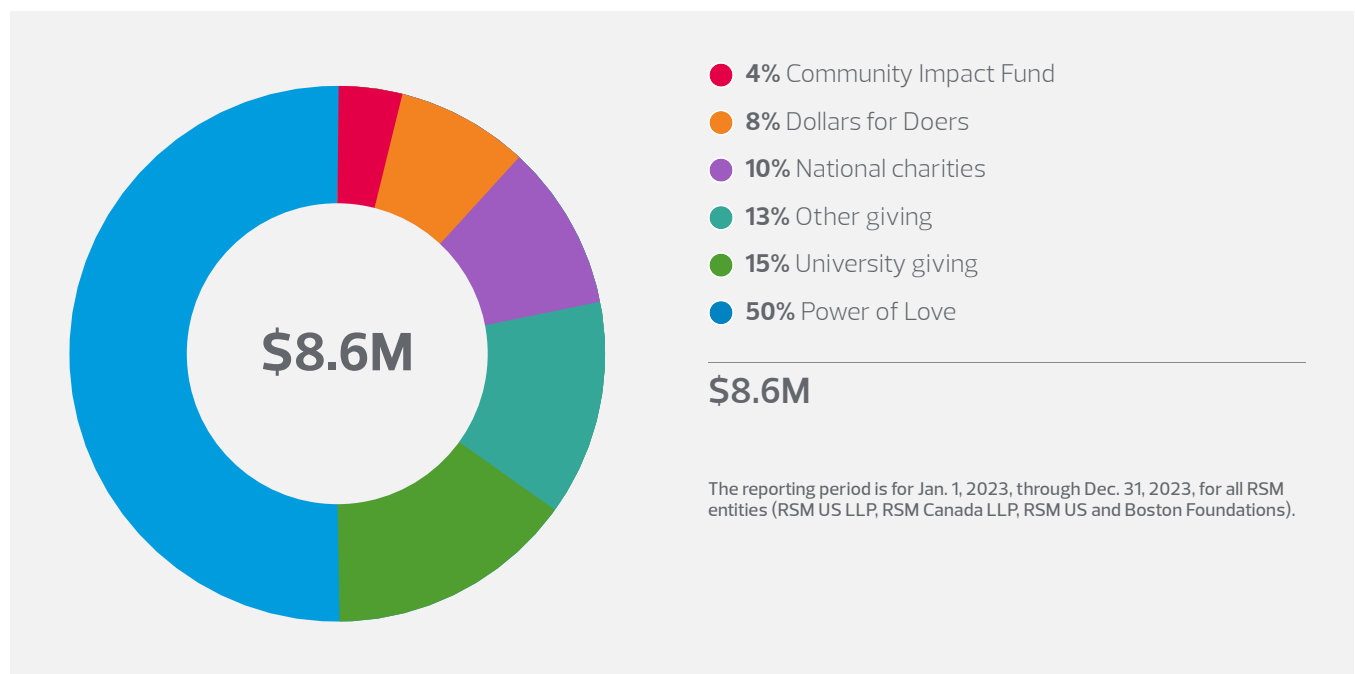
Community Impact

In 2014, we established the RSM US Foundation to enhance our giving efforts. A tax-exempt public charity, our foundation is dedicated to building tomorrow's middle market leaders by:

- Enhancing educational outcomes through programs for individuals to have a career path to become an entrepreneur or middle market business leader and/or
- Supporting organizations committed to providing a more stable environment for youth in the areas of hunger, housing or health, which will help them excel in education

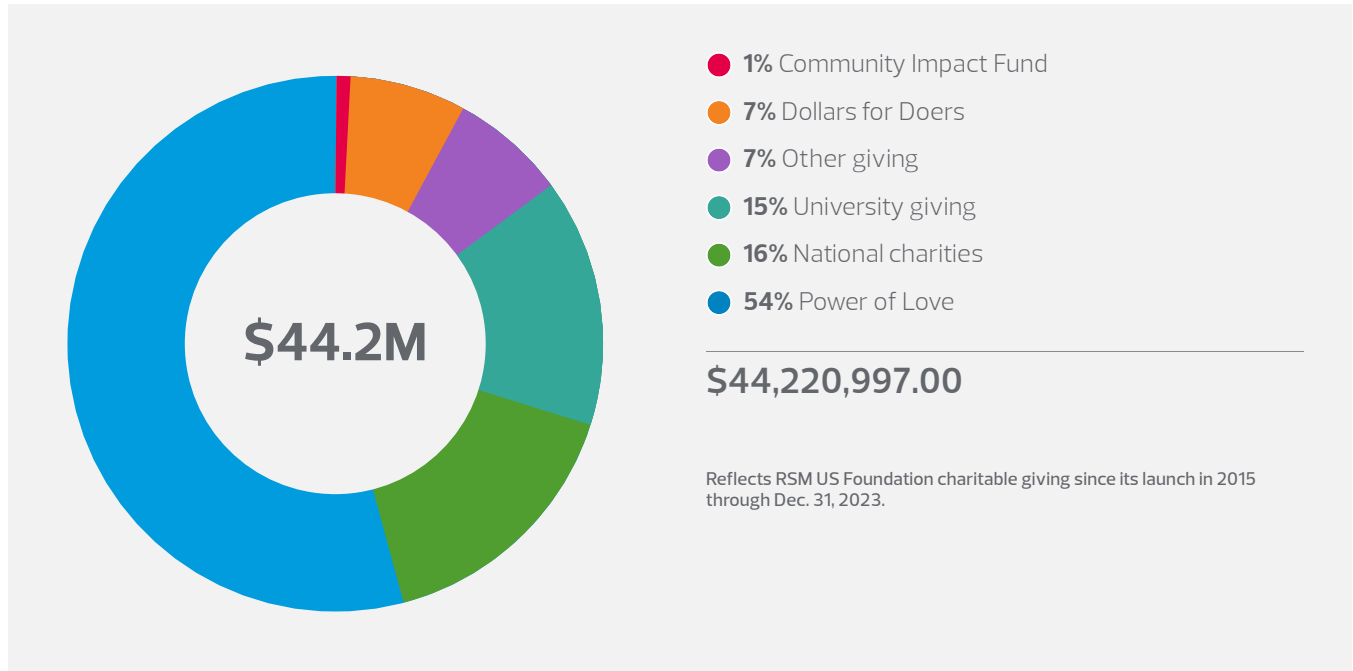
2023 charitable giving

The RSM US Foundation, our firm and our people contributed more than \$8.6 million to charitable causes in 2023.



2023 charitable giving

Since its launch in 2015, the RSM US Foundation's charitable activities total more than \$44.2 million to support causes aligned with our mission.



2023 stewardship highlights

Since its launch in 2015, the RSM US Foundation's charitable activities total more than \$44.2 million to support causes aligned with our mission.

More than **840** students supported by RSM volunteers through the BGCA Workforce Readiness Program

69 colleges and universities awarded scholarship funds to distribute to more than **100** outstanding students

\$390K in scholarships awarded to **31** students through the foundation's scholarship contests

100 charities supported by the Community Impact Fund

\$100K to a charity focused on mental health for youth

22 colleges and universities supported through the University Impact Fund with **\$280K**

More than **800** total grants awarded by the RSM US Foundation

24 RSM professionals on Junior Achievement boards

6,747 employee and partners volunteered through our Dollars for Doers program

30,700 hours volunteered by our people for the Power of Love

\$4.7M gifted to more than **100** charities through the Power of Love program

\$105K grant to support disaster planning and preparedness

2023 featured impacts



Power of Love

Hiring our Heroes

Each year, our [Power of Love](#) program supports more than 100 charities across the U.S., Canada, India and El Salvador through both fundraising and volunteering.

In 2023, we expanded the Power of Love to our El Salvador office where they committed to fundraising and volunteering in support of Glasswing International, a charity focused on addressing the root causes and consequences of violence and poverty through education and health programs that empower youth and communities. Hosting their first Power of Love volunteer event at a local school, 40 of our people spent their time painting murals, gardening and cleaning. The volunteer event generated a Dollars for Doers grant that amplified their volunteer efforts and their fundraising efforts were matched by the RSM US Foundation.





At a Power of Love event, RSM volunteers painted murals at an elementary school in El Salvador.

“As a team in a developing nation, we can make a strong, positive impact on our local communities. I am beyond proud of what we’ve been able to raise so far. The Power of Love has been an amazing experience and our people are more engaged than ever. Our efforts have a direct impact on the youth in our communities and it means so much to have the RSM US Foundation support us. We look forward to participating in the Power of Love for many years to come.”

– CARMEN MARTINEZ, MANAGING DIRECTOR, EL SALVADOR, RSM

Dollars for Doers

Our Dollars for Doers program supports our people's passions by magnifying their gifts of time to charitable organizations that support youth in their communities.

Gus Springmann, office of risk management manager in the Chicago office, volunteers with Maroons of Character, a yearlong program for the University of Chicago football team that introduces participants to the language of character, deepens their understanding of character strengths crucial for thriving on and off the field, and provides them with the tools to cultivate those strengths. Gus not only mentors three football players but also serves as the program's director, leading programming and educational sessions.

“Volunteering is important to me and I'm so grateful to have the RSM US Foundation's Dollars for Doers program take my efforts a step further by providing much-needed grant funding to an organization that is near and dear to my heart.”

– GUS SPRINGMANN, OFFICE OF RISK MANAGEMENT MANAGER, CHICAGO, RSM

Our [VALOR ENG](#) hosted its second annual national initiative with Wreaths Across America (WAA) with more than 30 RSM offices across the U.S. In 2023, Kelli Pfister, revenue enablement manager in San Antonio, organized more than 450 volunteers who raised more than \$89,000 for the purchase of wreaths and placed more than 5,000 wreaths in participating cemeteries nationwide. This effort was then amplified by a \$23,000 Dollars for Doers grant toward the WAA TEACH program. Kelli plans to expand this effort to even more RSM offices in 2024 and beyond.

“Wreaths Across America is a yearlong effort that unites our firm. It’s not just about our VALOR members; every single one of our ENG groups is represented in each of those cemeteries. It’s about coming together to raise funds for the wreaths and placing them in December while we remember and honor our veterans and teach our children about their sacrifice. This effort aligns so well with our values and I am honored to have the opportunity to lead this initiative across the firm.”

– KELLI PFISTER, REVENUE ENABLEMENT MANAGER AND MILITARY SPOUSE, SAN ANTONIO, RSM



RSM volunteers from San Antonio pause for a photo after supporting Wreaths Across America.

RSM US Foundation scholarships

Each year the [RSM US Foundation](#) awards more than \$390,000 in [scholarships](#) to talented and promising accounting, business and technology students in the U.S. and Canada through our Power of Inclusion, Power Your Education, First Generation and Power Your Transition Community College awards.



“Inclusion is important. College seems out of reach for so many people. I am so appreciative of the RSM US Foundation for this wonderful opportunity to continue to pursue my dreams. I think it’s important for people to apply for these types of scholarship opportunities—ones that are specific to your major. I didn’t think I’d win, I just hoped for the best and it’s been life changing.”

– YORLAN Y SERRANO, POWER OF INCLUSION SCHOLARSHIP RECIPIENT,
WEST CHESTER UNIVERSITY OF PENNSYLVANIA

“My parents are from Ghana and I have three younger brothers. I had to take two years off between high school and college because there was no way my family could afford college tuition and other expenses. I wanted to be an example and inspiration for my younger siblings by being the first in my family to attend college. The First Gen Scholarship has had a profound impact on my academic journey and on my family’s finances. Now I can focus on my studies without worrying how I’m going to pay tuition or fees. It’s very liberating.”

– BADARIAH UMAR, FIRST GENERATION SCHOLARSHIP RECIPIENT,
MINNESOTA STATE UNIVERSITY, MANKATO

University Impact Fund

Through the University Impact Fund, we build tomorrow's middle market leaders by supporting programming, events and activities focused on innovation, technology and inclusion at colleges and universities in communities where our people live and work.

At the Accounting Institute at Temple University, high school students learned how challenging, rewarding and lucrative a career in accounting could be by participating in a robust curriculum, interacting with accounting professionals and participating in a case competition, all while having an on-campus college experience with a stay in the school's dorms. Our funding, along with four other supporters, offered scholarships to students from underrepresented populations in the greater Philadelphia area so they can attend the two-week program for free.

“The Accounting Institute at Temple University has a bold mission of introducing inner-city high school students to the benefits of a career in accounting through a summer camp program. With fewer accountants entering the profession, this program focuses on alleviating the shortage while also lifting kids out of the cycle of generational poverty.”

– SUDHIR KONDISETTY, CONSULTING PRINCIPAL, PHILADELPHIA, RSM



Accounting Institute students visiting our RSM Philadelphia office.

Junior Achievement

In 2019, RSM launched a relationship with Junior Achievement USA (JA), allowing us to expand volunteer and financial support of JA and enabling our people to educate and empower youth through financial literacy. In 2023 alone, we provided more than \$680,000 to support special events, initiatives and programming to 28 local JA chapters across the U.S. and Canada. In addition to monetary support, RSM has nearly 300 people engaged in volunteering and 24 serving on JA boards.

In 2023, Junior Achievement of Greater St. Louis launched its first annual Stock Market Challenge student competition with the support of the RSM US Foundation and RSM principal and local JA board member, Chris Jones. The event featured 32 teams of two to four students each, plus numerous volunteers and local JA staff.



Chris Jones, RSM principal, with JA Stock Market Challenge students in St. Louis, Missouri.

“The competition gave participants a chance to put their knowledge and skills to the test in a high-energy and fast-paced environment. The kids were having a great time and their competitive spirit really shined through. As a volunteer supporting the event, it was truly an invaluable experience for everyone.”

– CHRIS JONES, PRINCIPAL, RSM AND LOCAL JA BOARD MEMBER

Boys & Girls Clubs of America

The Workforce Readiness program at the Boys & Girls Clubs of America provides critical education and skills to teenagers preparing to enter the job market. In 2023, RSM supported the program across six clubs, hosting 26 programs with more than 200 RSM volunteers and 840 youth participants.

“Club members cannot be what they cannot see. Being able to introduce our club members to adults who are doing things in their careers helps cast a vision for who they can be in the future.”

– JEREMY MURPHY, SENIOR CLUB DIRECTOR, UNION LEAGUE BOYS & GIRLS CLUB

Active Minds

The RSM US Foundation has supported Active Minds, the nation's leading nonprofit organization supporting mental health awareness and education for young adults, since 2020; this support has grown to include local efforts by our RSM professionals.

In August 2023, a group of RSM professionals volunteered for the Send Silence Packing® exhibit at the University of Maryland College Park.



Volunteers at the Send Silence Packing exhibit in Maryland.

“We were so proud to be a part of the exhibit and to continue the conversation to destigmatize mental health and support suicide prevention. It was powerful sharing the exhibit with thousands of students and encouraging to see how accepting students (and others) were of being part of the conversation around mental health. Our RSM volunteers left feeling proud and excited for the continued relationship between RSM and Active Minds.”

— JACK HOLLAND, CONSULTING SUPERVISOR, MCLEAN, RSM

Community Impact Fund

Launched in 2022, the Community Impact Fund was created to enhance the stewardship efforts of our passionate owners and employees by matching team fundraising efforts and amplifying relationships with qualifying local charities through one-time grants. This application-based program boosts our commitment to our people by supporting charities that mean the most to them.

Hannah Simard, consulting senior associate from the RSM New York office, was only six years old when her father passed away. The life she and her family once knew changed in an instant. Hannah and her nine-year-old sister were given the opportunity to attend Circle Camps, a free summer camp that offers multiyear programming to support young girls who have experienced the death of a parent. With a focus on community, service and adventure, the program gives kids the support, skills and tools to cope and enables them to make lasting friendships with others who understand the gravity of their loss.

Hannah now volunteers as a camp counselor each summer. At Hannah's request, Circle Camps recently received a grant from the Community Impact Fund to help ensure other kids have the opportunity to participate in their programming.

“I am so grateful for RSM's leadership in recognizing employees as a whole person, not simply their contribution within the workspace, and for the RSM US Foundation's Community Impact Fund that provides grants to organizations that are meaningful to our people.”

— HANNAH SIMARD, CONSULTING SENIOR ASSOCIATE, NEW YORK, RSM

Disaster relief

RSM and the [RSM US Foundation](#) are committed to supporting our people, their communities and beyond when disaster strikes. In addition to the dollars provided through the RSM US Foundation's Disaster Relief Fund to employees affected by a federally declared disaster, the Foundation provided a \$100,000 grant to the American Red Cross and a \$5,000 grant to the Canadian Red Cross Society.

This pre-investment in disaster planning and preparedness ensures tens of thousands of Red Cross workers—90% of whom are volunteers—have the know-how, equipment and technology to turn heartbreak into hope and stand with disaster survivors as they rebuild their lives.

By the numbers



Our ongoing dedication to preserving and improving the environment around us

Continuous progress takes dedication and intentional action. It takes discovery and acknowledgment, strong thought leadership, the sharing of knowledge, and the desire and know-how to be and do better. We've analyzed our business and identified both near-term opportunities and thoughtful, long-term strategies around [environmental sustainability](#), with the goal of creating positive changes for our people, clients, communities and planet.

Our environmental strategy includes:

- Reducing and monitoring our greenhouse gas emissions
- Infusing environmental stewardship into our culture
- Integrating environmental sustainability into our everyday business operations
- Infusing environmental stewardship into our culture

Reducing and monitoring our emissions

Reducing our greenhouse gas emissions is a vital part of our strategy. To take that one step further, we've created targets to help guide our focus and sustain momentum on specific areas that have a significant impact on our overall emissions.

Our current targets in the U.S. include achieving the following by 2030:

- Reducing emissions from natural gas energy by 50% from 2022 base year
- Reducing air travel emissions by 50% per full-time equivalent (FTE)* from 2019
- Reducing our square footage by one-third per FTE from 2019
- Sourcing 100% renewable electricity

*For purposes of tracking against our targets, FTE is defined as the average full-time equivalents in the U.S. during the calendar year.

ENVIRONMENTAL IMPACT

RSM is committed to transparently and accurately reporting our carbon emissions. With support from our [ESG advisory](#) practice, we collected data for our U.S. operations to report on our Scope 1, 2 and select Scope 3 (specifically, business travel) greenhouse gas emissions, and developed an emissions inventory using guidance from the Greenhouse Gas Protocol standards. We will work to expand data collection efforts across our full geographic focus in the coming years. Tying the below Scope 1 emissions data to our target of halving natural gas emissions by 2030, we observe encouraging progress, evidenced by a notable decline from 2022 to 2023.

RSM's carbon footprint	Jan. 1, 2022–Dec. 31, 2022	Jan. 1, 2023–Dec. 31, 2023
TOTAL gross greenhouse gas emissions (MTCO₂e)	32,079.45*	30,664.14
Scope 1	1,168.91	943.30
Natural gas utility	1,168.91	943.30
Scope 2	11,189.45	10,756.02
Electricity utility	10,968.91	10,517.56
Steam utility	220.53	238.46
Scope 3	19,721.09	18,964.83
Air travel	11,650.58	10,350.99
Non-air travel	3,664.16	3,999.51
Accommodations	4,406.35	4,614.33

*Calendar year (CY) 2022 Scope 1 and 2 data have been retroactively updated to reflect RSM's energy usage more accurately in 2022 due to data received from office landlords after the publishing of last year's report. In addition, to maintain comparability, CY 2022 Scope 3 emissions were updated, accounting for changes in calculation methodology.

This inventory only includes RSM US LLP offices located in the U.S.

MTCO₂e stands for metric tons of CO₂ equivalent.

Additional information on calculation methodology and boundaries can be found [here](#).

Reducing air travel emissions by 50% per FTE from 2019

As of Dec. 31, 2023, we've achieved an inspiring 50.09% reduction in air travel emissions per FTE since 2019. While we have surpassed our target, we're focused on long-term change and will work toward continued sustainable reductions at this level.

50.09% reduction

Reducing our square footage by one-third per FTE from 2019

RSM supports flexibility now more than ever, and our real estate team has been focused on adapting to our people's changing office space needs. We've made solid progress toward our target by achieving a 20.27% reduction in square footage per FTE since 2019.

20.27% reduction

2023 featured impacts



Infusing environmental stewardship into our culture

Local office eco champions

In 2023, our environmental employee engagement committee implemented eco champions in each local office across the U.S., Canada, India and El Salvador. More than 90 individuals now lead environmental programming in their local offices, which includes opportunities for learning, volunteer events, promotion of recycling and composting efforts, and more.

“With a great support system and an excellent team to collaborate with here in the Philly Metro market, we’ve transitioned our offices over the last few years toward a greener, more environmentally conscious future,” said Matt Raisch, location services manager lead for RSM’s Blue Bell, Philadelphia and Harrisburg, Pennsylvania offices. “We purchase and use compostable cups, plates and utensils, have composting bins in each of our three offices and more. I’ve always felt a responsibility to address the environmental issues we face as a society. I’m glad to play a small part here at RSM and look forward to helping achieve firm goals and initiatives going forward.”

“Through the encouragement of the environmental employee engagement committee and Davenport office leaders, we have changed the way we look at trash and are now proud to be sustainably active in our office and our community,” said Crista DeVore, locations services coordinator in Davenport, Iowa. “This past fall we held an electronics recycling drive that was a huge success! PCs for People took over 100 pounds of old e-waste (personal iPads and tablets, old personal computers and towers, video gaming equipment, speakers and cables, etc.) and responsibly recycled them. We donated what was still usable to the community to support equal access to technology for low-income families. Being the local environmental office champion has been a very rewarding experience and has opened my eyes to ways that we can better support our planet.”

Trash Dash

In September 2023, more than 205 of our people with their families and friends picked up trash in their local communities during the second annual Trash Dash. Their volunteer hours generated a \$6,000 Dollars for Doers grant from the RSM US Foundation that went toward KidsGardening, a nonprofit organization focused on creating opportunities for kids to play, learn and grow through gardening.

“We know from experience, and from scientific studies, that kids who have access to learning gardens have better nutritional habits, perform better academically and are better adapted socially,” said Em Shipman, executive director at KidsGardening. “Together, we are creating generations of happier, healthier and more engaged kids with a close connection to their food and community and engaged in nurturing a healthy planet. We can't thank you enough for joining us in support of this important mission.”

2023 Trash Dash



Employees from numerous offices helped keep their communities clean by participating in our annual Trash Dash, including those pictured above (top left, Greensboro, North Carolina; top right, Fort Lauderdale; bottom, Minneapolis)

Collaborating with strategic ecosystems

University of California, Irvine case competition

This year the University of California, Irvine (UCI) hosted their inaugural Road to Net Zero case competition which focuses on factors such as carbon emissions, energy efficiency, waste management, use of natural resources, efforts toward sustainability and mitigation of the effects of climate change. The students at UCI were tasked with developing a strategic, actionable, practical and financially feasible plan for a company of their choice in the fast-food industry to achieve a net-zero emissions target by 2030. Part of the competition included feedback from professionals in the ESG field; two of our people in our ESG advisory practice, Kyra Pollak (senior associate) and Trish Beltran (manager), were able to participate in the competition, educating students on ESG and creating a relationship with UCI students.

"I had the opportunity to co-develop as well as be one of the judges of the 'Road to Net Zero' case competition for students at UCI," said Kyra Pollack. "The competition inspired students to think critically about sustainability issues, helped students develop their soft skills in presenting as well as educated students on what might be considered when looking into the greenhouse gas emission inventory of a company. My involvement in the competition fostered community engagement by promoting awareness of net-zero initiatives, showcasing RSM's ESG services, encouraging collaboration among participants, and ultimately, contributing to the development of feasible strategies for a more sustainable future."

Paper reduction

Through collaboration with vendors such as DocuSign and Secure Print, we're able to better understand our paper usage trends over the years and the impact of our actions. We're proud that as of 2023, our paper usage has decreased by nearly 77% since 2019.