A century of understanding. Exponential possibility.

RSM US LLP FY26 IMPACT REPORT

RSM US LLP is proud to present an in-depth review of our performance over the past fiscal year. The business landscape is evolving faster than ever—driven by breakthroughs in artificial intelligence and technology, geopolitical shifts, economic uncertainty and a more complex regulatory environment.

Our fiscal 2026 Impact Report demonstrates how our people, processes and technology have met these challenges head-on, helping clients become more strategic, efficient and resilient. It also reinforces the enduring standard that guides us—an unwavering commitment to our clients, our people and our communities that fuels continuous improvement across generations.

For a century, clients have placed their trust in RSM. We remain focused on evolving as a compelling, digital and global firm that drives exponential value for clients.

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Letter from

Brian Becker

Dear clients, colleagues and friends,

The world is changing faster than at any point in our lifetime. Technology is redefining how businesses operate. Capital is moving across borders at unprecedented speed. And the middle market companies that drive the global economy—dynamic, ambitious and growing—need advisors who can see how a decision could ripple across their entire organization before the first recommendation is ever made.

RSM was built for exactly this moment. And this year, we celebrate 100 years of proving it.

Only 0.5% of companies reach a century. We are one of them because generation after generation of RSM professionals chose to embrace change rather than resist it. That spirit of stewardship—the conviction that it is our job to leave things better than we found them—is the reason we are still standing. It is also the reason I believe our best years are ahead.

Our centennial theme—*RSM to the Power of 100*—captures something important. One hundred years is not our ceiling. It is our base. A century of trust, proximity and deep understanding of the middle market is now the multiplier for everything we do next. And what we are building from that base is not incremental. It is transformational.

> ***"One day, a future generation of RSM leaders will look back at this moment and ask: did we lean into change, or did we hesitate? Did we protect the status quo, or did we build the future? I am confident in the answer. We are building the future—deliberately, purposefully and together."***
>
> **Brian Becker,** CEO of RSM's Transatlantic Partnership and Managing Partner of RSM US LLP

We are building a different kind of firm. On Jan. 1, we launched our transatlantic partnership with RSM UK, creating a first-of-its-kind, partner-owned enterprise spanning the U.S., UK, Canada, Ireland, India and El Salvador. With more than 23,000 professionals and combined revenues exceeding $5 billion, our clients will experience RSM not as a firm with offices in many places, but as an advisor whose capabilities are as borderless as their own ambitions. The early results have been encouraging. And we are nowhere near finished.

We are also becoming a truly digital firm. We are not a professional services firm that merely uses technology. That is a fundamentally different mindset. Our $1 billion investment in technology and AI and our digital core is focused on amplifying what our people can do—not replacing why clients need them. In a world where artificial intelligence is rapidly commoditizing IQ, emotional intelligence will be the ultimate differentiator: the ability to truly listen, to understand a client's whole business—not just its parts—and to deliver the power of being understood. That human insight, amplified by digital tools, is what we will deliver.

We are expanding our capabilities to match the complexity our clients face. RSM Catamaran continues to help clients modernize operations. Our new deal services practice unifies capabilities across the full deal lifecycle. And our middle market thought leadership helps clients navigate economic, policy and geopolitical uncertainty with clarity. While others were built to serve the largest or the smallest companies, we were built for something different. We have a century of expertise serving the middle market and building services and solutions tailor made to fit their needs.

Our commitment to community endures. Through the RSM US Foundation and the generosity of our people, we continue to multiply our impact—empowering confident futures for youth, one community at a time.

Everything we do is grounded in our purpose: **to instill confidence in a world of change.** That purpose has never been more relevant. The forces shaping tomorrow may be global, but their implications are always felt close to home—in the businesses we serve, in the communities where we live and work, and in the careers we are building together.

One day, a future generation of RSM leaders will look back at this moment and ask: did we lean into change, or did we hesitate? Did we protect the status quo, or did we build the future? I am confident in the answer. We are building the future—deliberately, purposefully and together.

Here's to the next 100 years, and to the exponential possibility that grows from this foundation.

Sincerely,

Brian Becker, CEO of RSM's Transatlantic Partnership and Managing Partner of RSM US LLP

Letter from
Jamie Burgess

Dear clients, colleagues and friends,

One hundred years of partnership. That is what RSM celebrates this year—the cumulative weight of a century's worth of decisions made in the interest of something larger than any one of us. The most important of those decisions share some common threads: They prioritized the long term over the expedient, the collective over the individual and the future over the familiar.

That is why we are in the enviable position we hold today. RSM was built to serve the middle market, and our clarity of purpose continues to set us apart in a changing world.

> ***"Ira B. McGladrey started this firm with conviction and a willingness to do things differently. One hundred years later, that same spirit lives in the partners, professionals and leaders who carry this firm forward every day. As a board, our job is to protect that spirit and to ensure it has the structure, the resources and the runway to reach its full potential."***
>
> **Jamie Burgess,** Chair of the Board, RSM US LLP

The forces shaping our profession will only accelerate. AI, evolving regulation, shifting talent expectations and geopolitical complexity are not distant challenges. They are here. Our task as a board is not simply to help the firm respond to that change, but to ensure RSM is positioned to define it. That requires the courage to invest ahead of demand, the clarity to support difficult strategic choices and the discipline to hold ourselves accountable for results.

The result is an organization built for where the middle market is going, not where it has been. Our clients have increasingly global ambitions and complex operations. They need advisors who can move as fast as they do. In a rapidly evolving landscape, being decisive and agile with our strategy ensures we are in a position to help our clients achieve their business objectives through relevant insights, compelling services, digital solutions and an organizational structure that enables seamless collaboration focused squarely on their needs.

This year, we built a platform for unprecedented scale. The formation of our transatlantic partnership with RSM UK is one of the most significant structural transformations in our firm's history. It required the alignment of governance models across multiple jurisdictions, the integration of shared values into a common framework and the commitment of partners on both sides of the Atlantic to build something that has not existed in our profession: a truly partner-owned, cross-border enterprise. That did not happen by accident. It happened because our governance model was strong enough to support it and flexible enough to evolve with it.

But scale without discipline is just size. What gives me the greatest confidence is not how large we have become, but how clearly we have defined the principles that will guide our growth—shared values, aligned incentives. A relentless commitment to quality and client service. Strategic investment in technology, talent and capability. And a culture of stewardship—the belief that every generation of leadership has an obligation to leave this firm better than they found it.

Ira B. McGladrey started this firm with conviction and a willingness to do things differently. One hundred years later, that same spirit lives in the partners, professionals and leaders who carry this firm forward every day. As a board, our job is to protect that spirit and to ensure it has the structure, the resources and the runway to reach its full potential.

I am proud of the foundation we have built. I am confident it will prove solid as we pursue the opportunities ahead.

Sincerely,

Jamie Burgess, Chair of the Board, RSM US LLP

On behalf of the RSM US LLP Board of Directors: Brian Becker, David Dobranic, Karen Galivan, Carlos Hernandez, Susan Martinelli, Kate Seitz, Vikas Sekhri and Matt Talcoff

RSM's Impact

Our holistic approach to service provides the integrated solutions across industries and geographic borders to help middle market businesses navigate today's challenging economy.

RSM by the numbers

RSM transatlantic partnership*

RSM US and RSM Canada as of April 30, 2026; RSM UK and RSM Ireland as of March 31, 2026.

$5.0B
revenue in FY 2026

1,500
partners and principals in fiscal 2026

21,698
employees in fiscal 2026

119
total locations

Revenue Mix

RSM US, Canada, UK and Ireland data for the most recent fiscal year ending in 2026.
Breakdown by LOB:

- 40% Consulting
- 33% Tax
- 27% Assurance

RSM International Network**

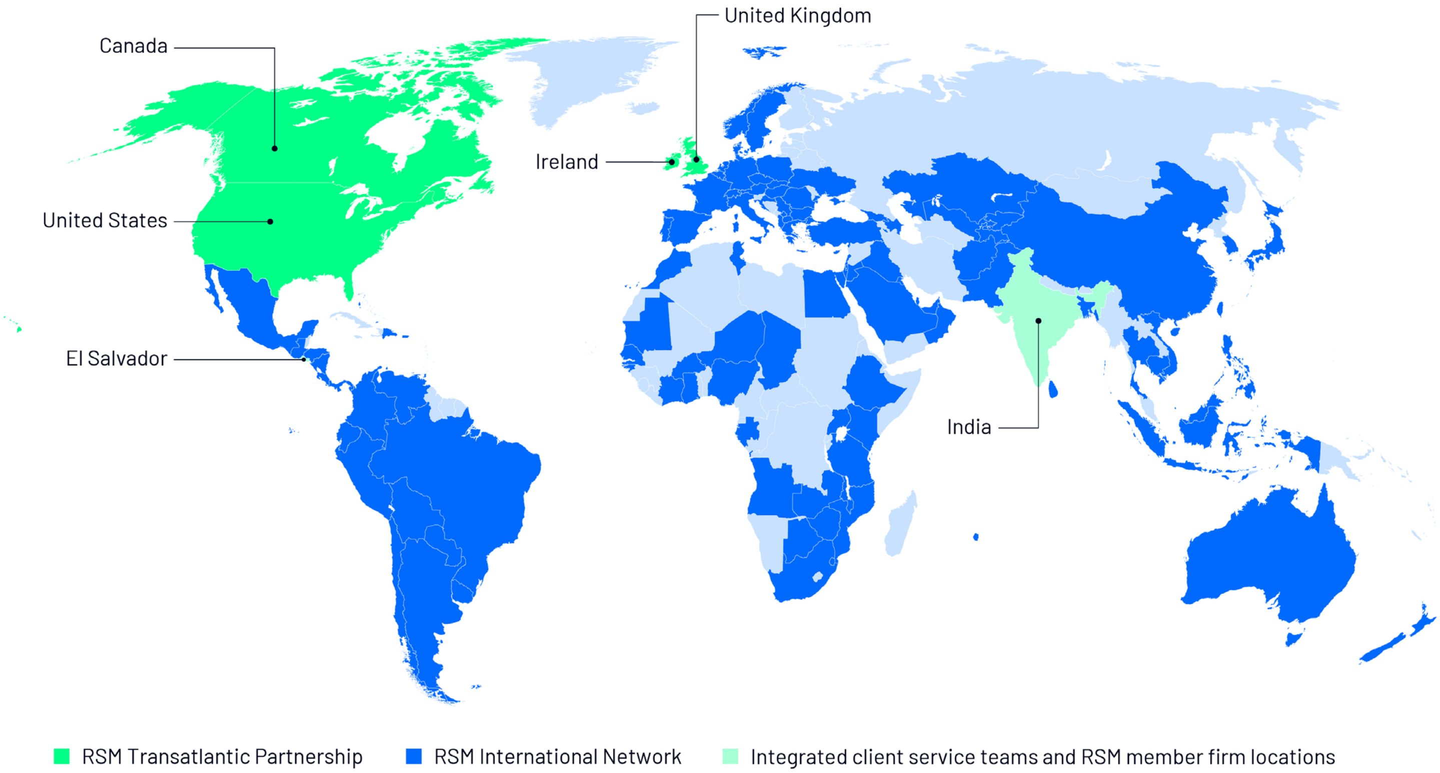
$7.7B
revenue in calendar 2025

56,000
people

500
offices

120
countries

RSM locations



** References to the transatlantic partnership mean a limited liability partnership that serves a centralized governance role based on certain authority delegated by RSM US, RSM Canada, RSM UK and RSM Ireland (the "Firms"). The transatlantic partnership does not service clients or otherwise engage in business activities. Each Firm is a separate legal entity for legal, regulatory and tax purposes. References to "enterprise," "platform," "us," "we," "our" and the like, mean each of the Firms operating under the new centralized governance structure, and should not, under any circumstances, be interpreted to mean that the Firms are anything other than separate legal entities for legal, regulatory and tax purposes. The information herein reflects the aggregated (i.e., sum of the) results, headcount, locations and revenue mix of the Firms.*

*** RSM International is a global network of independent assurance, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party.*

Governance

Sustainable, scalable governance for the future

Our U.S. governance structure is designed to support the long-term sustainability of our business and promote transparency with our stakeholders. Our board of directors serves as the firm's governing body, providing oversight and strategic guidance that aligns with our firm's objectives. Through this structure, the board helps ensure we continue to operate with the quality, integrity and client service excellence that have defined our firm for a century.

Enduring commitment to quality and excellence

Quality is paramount at RSM. For 100 years, it has been foundational to how we serve our clients, support our people and uphold our responsibilities to the public. Through a firmwide commitment to quality, we deliver services with due professional care, competence and integrity.

That commitment is reflected in how we continue to evolve our practices. We are working to transform our client onboarding journey, making it easier to do business with us while reinforcing consistency, transparency and risk awareness from the outset of each engagement.

At the same time, we are modernizing our risk management processes and practices through innovation—embedding quality and oversight into how work is planned, executed and monitored. Read our commitment to audit quality and professional excellence for more details about audit quality and innovation at RSM.

Code of Conduct

Annually, all of our people affirm their adherence to RSM's Code of Conduct, which guides our ethical decision making and behavior. The Code outlines the standards we uphold and reinforces how we build and maintain trusted relationships with our clients, colleagues and other stakeholders. It is anchored in our values:

OUR VALUES

Respect and uncompromising integrity

Impactful innovation

Teamwork: Succeeding together

Excellence in all we do

Stewardship: Acting responsibly

Ethics and independence

As a member of the RSM global network, our firm complies with global ethics and independence policies. These include establishing and documenting both firm and engagement team independence before services are provided. RSM InTrust serves as our system of record for evaluating independence. Any actual or potential threat to independence is required to be reported and is promptly reviewed by the firm's Office of Ethics and Independence to determine appropriate action.

Zero tolerance

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's 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, at reportlineweb.com/rsmus or by telephone for those in the United States and Canada by dialing +1 800.913.5052, in India by dialing 022.5032.304, and in El Salvador by dialing 2136.8498. For all other countries, please report online at reportlineweb.com/rsmus.

Elevated risk management powered by AI

Behind every compelling client experience is a strong foundation of trust, quality and risk oversight. RSM's office of risk management is strengthening that foundation through the thoughtful use of AI, advancing how risk is identified, monitored and managed.

RSM is integrating AI-enabled analytics as a risk management enabler, not a replacement for professional judgment. By helping teams streamline routine processes, analyze and synthesize large volumes of information, and efficiently surface potential risk indicators, AI enhances consistency and insight while allowing our risk professionals to focus on higher-value analysis and advisory support.

These capabilities are being embedded within established risk frameworks and governance practices, including clear accountability, oversight and model governance, ensuring human judgment stays central. The result is more timely insights, stronger oversight and a risk management approach that scales effectively in an increasingly complex global business environment.

As RSM continues to evolve as a digital and global firm, it is using technology to reinforce quality today while preparing the firm to navigate tomorrow's risks with confidence.

Strategy

Powering exponential impact

As we mark our 100th anniversary, RSM's strategy is centered on a clear ambition: to be the first choice for the middle market—delivering differentiated value through a compelling client and talent experience, advanced digital capabilities, and an integrated global platform.

Building on our century-old foundation of trust and relevance, we are accelerating into our next era—positioning RSM to create exponential impact and multiply success for our clients, our people and our communities. This strategy is brought to life through a focus on being compelling, digital and global, grounded in our purpose to instill confidence in a world of change and our brand promise: the power of being understood.

Compelling

Being compelling means delivering a distinctive experience built on deep understanding—for both our clients and our people.

For our clients, this translates to insight-led, personalized engagement that combines deep knowledge of the middle market with digital enablement. Deeply understanding each client's business, challenges and ambitions—and leveraging advanced tools and data-driven insights—enables more confident decisions.

These dimensions reinforce one another—by investing in our people and culture, we strengthen our ability to deliver differentiated outcomes and deepen client trust.

For our people, it means fostering a culture of peak performance, where individuals are empowered to grow, innovate and make an impact. Through collaboration and continuous development, and an emphasis on wellbeing and belonging, we enable our professionals to deliver their best.

Digital

We are accelerating our digital transformation to enhance how we deliver value to our clients and empower our people. The cornerstone is our $1 billion investment in artificial intelligence and advanced technologies, integrating intelligent capabilities across our services and operations.

This commitment is transforming how we work—combining deeper insights, greater efficiency and higher-quality outcomes—while building a digitally enabled workforce ready to meet the evolving needs of the middle market.

Global

We are strengthening our global position through our transatlantic partnership between RSM US and RSM UK, creating a scaled platform to serve clients better across borders.

With approximately 23,000 professionals and $5 billion in combined revenue, this partnership enhances our ability to deliver seamless, high-quality services and positions us for continued growth.

As we enter our second century, we are building on the solid foundation of our first—combining deep understanding with bold investment and global scale to multiply our impact and deliver sustained, differentiated value.

Information security

A proactive roadmap to manage risk

RSM's information security program establishes a secure foundation for sustainable digital growth through strategic, technical and organizational measures that protect the firm's digital assets.

Our information security mission calls for protecting the confidentiality, integrity and availability of RSM and client data. To support this mission, our leadership team drives continuous improvement through appropriate levels of oversight, active engagement and a risk-based approach to safeguarding protected information. This approach is reinforced through mandatory information security and privacy awareness training upon an employee's hire and annually thereafter, including ongoing phishing detection training.

We have a dedicated information security team led by our chief information security officer. This team includes the office of the CISO, security operations, cybersecurity incident response, security architecture and engineering, and information security governance. Our information security standards align with the internationally recognized ISO/IEC 27001: 2022 framework. They are further shaped by industry best practices, regulatory requirements and the specific needs of our operating environment.

Information security risk management

Our approach to information security has evolved beyond traditional, reactive technical risk management to encompass a comprehensive strategic framework. We follow a proactive roadmap that anticipates and manages emerging cybersecurity risks, aligns with global trends and adapts to the dynamic threat landscape. RSM embeds security considerations into the sourcing of digital products and services. Any vendor solution that stores or accesses confidential information undergoes a formal security review, and our vendor agreements include appropriate requirements for confidentiality, security, privacy, data integrity and breach response. In addition, contractors and other nonemployees are required to comply with RSM's acceptable use and information security policies.

Information security incident management

We continuously monitor for threats, vulnerabilities and security events through industry-leading prevention and detection capabilities spanning endpoints, systems and networks. Our incident response plan is supported by a dedicated and experienced incident response task force and is subject to regular testing to ensure timely and effective response.

Collection, use and retention of personal information

We collect, use and retain personal information subject to our publicly available privacy policy. As described in that policy, we process this data for several purposes, including providing services to our clients. This data may be retained for as long as necessary for the purposes described in our privacy policy, to achieve the goals for which the information was collected or as permitted under applicable law. Our privacy program is overseen by a dedicated enterprise privacy office under the leadership of our enterprise privacy leader.

Information security constantly evolves

As the threat landscape continues to evolve, RSM strengthens its capabilities across people, processes and technology to protect the firm and support our clients. Building on more than a century of client service, RSM pairs trusted service delivery with modern, resilient security practices that support clients' missions today and into the future.

Central to this effort is our people. RSM's expanding information security team operates across a global footprint, delivering continuous 24/7 monitoring and incident response capabilities. The team has doubled in size over the past decade, improving our ability to respond swiftly, collaborate effectively and apply deep subject matter expertise to emerging challenges.

A recent milestone in our process-driven approach to information security is RSM's achievement of Cybersecurity Maturity Model Certification Level 2 assessment as an External Service Provider. This designation formally distinguishes RSM as both a managed services provider and a managed security services provider for government contractors handling critical national security information. This accomplishment, in addition to our existing authorization as the largest certified third-party assessment organization within the CyberAB ecosystem, underscores the firm's unwavering commitment to helping clients meet the U.S. Department of Defense's stringent cybersecurity requirements and reflects RSM's longstanding commitment to helping clients navigate change with confidence.

RSM has long incorporated machine learning and AI technology into its capabilities—with active use predating 2020—to strengthen detection and prevention, streamline analysis, and drive continuous improvement. This mature and deliberate application of advanced analytics enables the firm to adapt rapidly to evolving threats and deliver resilient, dependable security outcomes.

Client experience

The power of understanding—at scale

Amid economic uncertainty, rapid technological change and global complexity, organizations need more than services—they need an advisor who truly understands them. Our mindset to understand before we solve shapes how we support organizations navigating growth and transformation across industries and geographies.

We take time to understand each client's goals, challenges and operating environment to simplify complexity, anticipate what's next and deliver insights that matter. By looking beyond the individual engagement at the fuller picture, we help clients make better decisions today while preparing for the future.

For example, RSM recently worked with The City of Cornwall, Ontario on an engagement that quickly grew to be transformational. The project began by using AI to bridge the language gap for individuals seeking asylum in the city, eliminating the need to hire costly translators. Using what they learned, RSM and the city then collaborated to address broader customer service issues. Today Cornwall is using AI technology to give all citizens easier access to housing and human services.

In an engagement with Payroc WorldAccess, LLC, an Atlanta-based financial services and payments company, RSM brought together multiple practices to deliver a coordinated approach grounded in shared planning, clear accountability and consistent execution. The team modeled trust-building behaviors—responsiveness, curiosity, early communication of issues and collaborative problem-solving—to improve visibility into Payroc's needs, surface risks and opportunities sooner, and strengthen executive-level relationships over time.

These examples reflect how we earn our role as a trusted advisor—by staying curious, engaging the right expertise and delivering solutions that create real value. We continuously gather and act on client feedback so we can adapt quickly, raise the bar and strengthen every interaction. That feedback loop ensures our services evolve alongside our clients' needs.

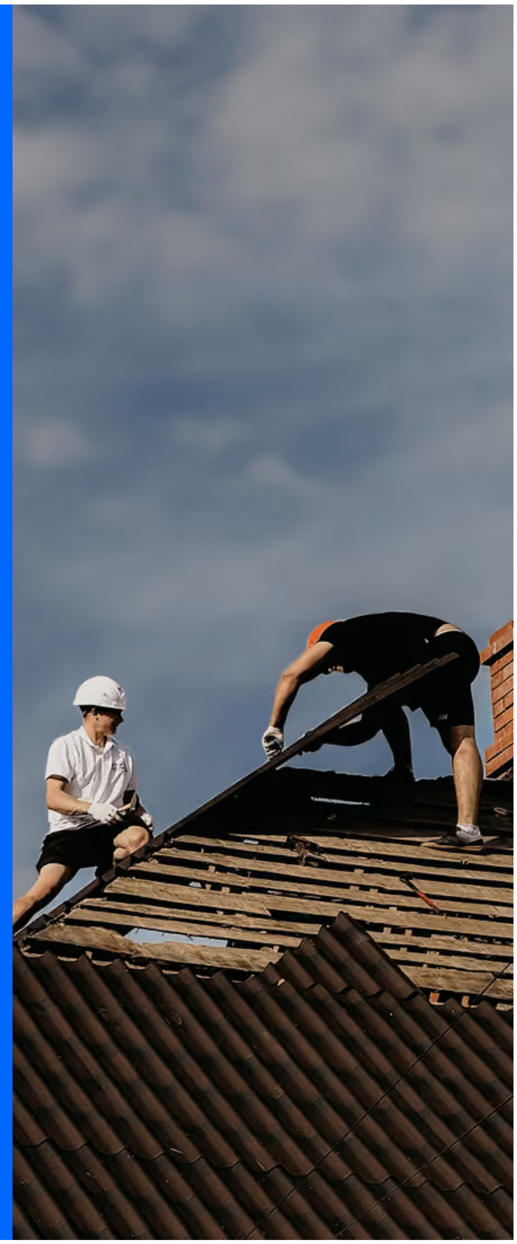
Looking ahead, RSM remains focused on enabling our clients' futures. By investing in our global platform, digital capabilities and our people, we bring the power of being understood to every engagement—helping clients navigate change, seize opportunity and move forward with confidence.

Putting people back in their homes

FloridaCommerce, a government agency responsible for driving economic growth across the state of Florida, launched a critical recovery program following severe devastation from Hurricanes Irma and Michael. To do so, it needed a trusted advisor to help manage one of its most complex and highly visible initiatives to date. RSM was selected for its risk consulting know-how and its ability to listen first.

The RSM team focused on understanding what was already working and where targeted oversight could reduce risk and streamline processes. A customized project plan and clear timeline enabled immediate, practical collaboration and built confidence from the outset.

The result: FloridaCommerce was able to expedite repairing and rebuilding homes; strengthening community infrastructure; and providing disaster assistance and loans to individuals, small businesses and agricultural producers hurt by the impact of the storms.



Talent experience

Driving peak performance

At RSM, our talent experience is intentionally designed to help our people grow forward: advancing their careers and inspiring them to perform at their peak, delivering high quality service to clients. As the firm continues to evolve, we've invested in people managers, expanded learning and built global capabilities that empower both our people and our clients to succeed.

Our people managers/performance advisors represent the front line shaping the talent experience. To strengthen their ability to guide career development, performance conversations and transitions with confidence and consistency, we launched a Performance Advisor Academy, complete with live skill-building opportunities and on-demand resources. This development elevates everyday employee-manager interactions to drive peak performance and reinforce our human-centered culture.

New curated learning curricula for all our people are personalized by line of business, role and level. Each program is designed to develop the most critical skills needed to serve clients and lead teams with excellence at every career stage. It takes the guesswork out of learning and provides a framework for performance advisors and employees to have meaningful development conversations—strengthening shared accountability for growth.

As RSM expands across borders and time zones, we are focused on helping our people lead and collaborate effectively in global environments. New global resources and learning, including global recognition guidance and key cultural considerations, improve the day-to-day experiences for globally connected teams.

As we grow, we remain grounded in our culture and focused on creating an environment where people can thrive at every stage of life and career. Our culture continues to be externally recognized. In fiscal 2026, RSM was named to PEOPLE Magazine's 2025 list of 100 Companies That Care and to Forbes' list of America's Best Employers for Company Culture and a decade of being certified as a Great Place to Work®.

Looking ahead, we will continue to deepen manager effectiveness, expand personalized learning and strengthen global connections by accelerating our shift to a skills-powered workforce—enabling faster, more accurate staffing that aligns people's strengths to the client work where they can perform at their best.

By investing in our people with intention and care, RSM strengthens not only the employee experience, but also our ability to serve clients with confidence, consistency and impact—today and into the future.

Enhancing U.S. benefits: More choice. More confidence. More protection.

At RSM, we redesigned our 2026 U.S. health care benefits to support our people and their families better by balancing monthly affordability with the need for reliable coverage and financial protection.

New medical plan designs gave them more control to match coverage to their health needs, risk tolerance and household budget. We also introduced accident, hospital indemnity and critical illness coverage to help families manage life's unexpected moments.

We paired this expanded choice with stronger guidance. Benefits are often a family-based decision, so we created a new externally accessible website that allows spouses and family members to participate. We also offered a spectrum of guidance—from self-service tools for those who prefer to evaluate options independently to one-on-one consultations with benefits advisors who take employees through the election scenarios step by step. This multilayered approach empowered employees to make decisions with clarity and confidence.

Expanding mobility and career pathways

At RSM, careers aren't one-size-fits-all. When our people are ready to grow or explore something new, they don't have to leave the firm to do it. Through rotations, internal transfers and global opportunities, RSM offers multiple ways to build a fulfilling career while staying connected to the organization.

Our dedicated internal mobility team helps employees navigate these options. Virtual internal career fairs further support this journey by creating space to ask questions, learn from peers and explore opportunities, whether someone is actively pursuing a new role or simply curious about what's possible.

This focus is delivering results: internal hires for full-time roles increased with 47% more people starting a domestic rotation and 52% more embarking on global assignments year over year.

Insight from an internal rotation in Washington National Tax:

"Working in the credits, incentives and methods federal tax advisory practice in 2024, I applied for and received a rotation with Washington National Tax (WNT), which turned out to be an amazing professional opportunity.

During my rotation, I gained a greater understanding of WNT's purpose. In familiarizing myself with the overall role and stepping into the shoes of a WNT member, I deepened my knowledge of how best to work with WNT when I would be back in the field. More than that, I found the work fascinating.

Experiencing the daily conversations, debates and problem-solving firsthand was very rewarding, even producing innovative solutions for our clients. Highlights of my rotation included contributing to articles for The Tax Adviser and RSM's website, speaking at conferences, developing service offerings, and drafting tax opinions.

These opportunities significantly deepened my technical knowledge and allowed me to build strong collaborative relationships while broadening my perspective."

Digital

Advancing an AI-enabled future for the middle market

RSM's digital transformation accelerated from investment to impact, as the firm scaled AI, aligned leadership and delivered AI-enabled services that enhance client engagement, reduce friction and support growth.

This progress positions RSM to anticipate and shape the next era of middle market professional services while strengthening the consistency, quality and insight behind every client interaction.

$1 billion AI and digital core investment

The firm reinforced its long-term digital strategy with a $1 billion, multiyear investment in AI and its digital core. This provides the capital, infrastructure and governance required to embed AI across assurance, tax and consulting services—driving improvements in efficiency, quality and client outcomes while advancing the firm's data foundation.

Rather than focusing on isolated tools, RSM's approach prioritizes enterprise capabilities, including agentic AI methodologies that support task execution, decision making and scalable delivery across the client lifecycle.

Platforms, ecosystems, people and partnership

RSM continued embedding AI directly into daily professional workflows. Scaling Microsoft 365 Copilot across the organization (15,000 users and growing) and integrating it with secure platforms and the firm's knowledge ecosystem enabled faster research, more efficient workflows and consistent insights, while maintaining strong professional standards and governance.

Teams are operating with a greater focus on client-facing, value-driven work amid the focus on AI capabilities. RSM's digital strategy is grounded in a simple principle: technology delivers value when people are equipped to use it effectively. Role-based enablement and hands-on learning are strengthening digital fluency across the firm.

RSM's proprietary capabilities such as Content Explorer and Digital on Demand helped teams streamline routine activities. The Growth AI Ecosystem advanced as an integrated set of AI tools supporting professionals across each client's growth lifecycle.

A digital strategy group was formed following RSM's January 2025 transatlantic partnership linking the United States, the UK, Canada, Ireland, India and El Salvador. The group aligns priorities across the network, enabling innovation to scale digital technology while reflecting local market needs.

AI-enabled middle market services

The impact of RSM's digital strategy is most evident in how services are delivered. AI and digital capabilities are applied directly within client work, improving efficiency, enhancing collaboration and driving more consistent, high-quality outcomes.

Enhancements to how engagements begin are also reducing duplication and enabling a more seamless transition from opportunity to delivery.

Together, these advancements are strengthening how RSM professionals engage clients, enabling deeper relationships through better insight, simpler workflows and more connected data.

Advancing the arc

Taken together, our work in digital for fiscal 2026 reflects a clear progression: Invest. Enable. Lead. Scale. Deliver.

For more than 100 years, RSM has evolved alongside the businesses it serves. Today, its digital transformation continues that legacy, strengthening the firm's ability to deliver consistent, high-quality outcomes and support long-term growth in an AI-enabled future.

2026 digital delivery highlight.

- **myRSM:** RSM's dynamic digital hub seamlessly unites people and work into one intelligent, connected experience, standardizing how engagements are launched, managed and delivered across assurance, tax and consulting. The hub flexibly empowers each practice's unique way of working and streamlines onboarding and opportunity creation.
- **Agentic AI sales ecosystem:** This internal RSM initiative harnesses agentic AI to reimagine how we scale, enable and accelerate sales and business development by surfacing intelligence, flagging risks and opportunities, and supporting higher-quality client conversations.
- **PartnerSight® (expanded licensing):** Our proprietary, cloud-native tax allocation and data platform supports financial institutions, private equity and family offices, strengthening digital tax infrastructure.
- **RSM NextWave:** An internal innovation program, NextWave accelerates AI-driven ideas from concept to pilot, delivering measurable gains in client service and productivity.
- **IntellixCore partnership (UK):** This partnership expands AI capabilities across assurance, tax and consulting, deepening international adoption.
- **AXL partnership (Canada):** This relationship advances applied AI solutions to deliver scalable digital capabilities and foster internal innovation.

Assurance services

The power of a century of trust—shaped by innovation, insights and AI

As expectations rise in the increasingly complex business environment, our assurance practice remains a cornerstone of RSM. In fiscal 2026, we transformed how we deliver services through new technology, while staying anchored in professional judgment and due professional care. This reinforced our position as a leading provider of audit and assurance services to public, private and private equity-backed middle market companies and to the public sector—creating enduring value for businesses, investors and the capital markets.

Bolstering delivery of high-quality digital audits

Continued investment in audit quality and thoughtful adoption of advanced technologies, including AI within our RSM Luca digital audit ecosystem, has enhanced consistency, collaboration, efficiency and risk assessment across engagements. The latest application, Ask Luca, is a generative AI tool that accelerates auditor research and access to guidance that is critical to delivering high-quality audits. We also made advancements in risk-focused data analysis, financial statement validation and automated audit evidence reviews.

These AI-powered tools, combined with streamlined workflows and greater workpaper standardization, provide our teams with the expanded capabilities and capacity needed to focus more time on complex and higher-risk areas, analyze more comprehensive data, and deliver deeper business and industry insights. In turn, our disciplined execution helps our clients strengthen their internal controls, make more informed decisions and drive value creation that supports growth or preparation for an exit.

The result is an audit that is both rigorous and relevant, and an enhanced experience for our clients and our people.

Empowering our people

Amid rapid digital advancements and ongoing industry and regulatory changes, investment in learning across technology, advanced analytics, and emerging accounting and auditing standards equips our people with the technical skills they need to stay current.

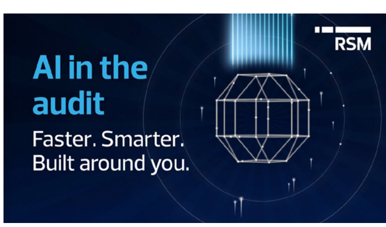
As AI becomes more embedded in the audit, however, the role of the auditor increasingly centers on judgment-based, client-facing skills and higher-value activities. That's why we provide our talented RSM US and RSM Canada assurance professionals with extensive coaching around professional skepticism, clear communication, critical thinking and relationship-driven leadership. These professional capabilities enable our auditors to engage more deeply with clients, elevate audit quality and develop earlier into confident advisors.

Supported by a new learning curriculum structure designed to support career progression and skill development, we delivered more than 230,000 hours of continuing professional education (CPE) training across the assurance practice.

As we redefine what it means to work in assurance, we strive to create rewarding careers for our professionals and enable them to grow, lead and advance the profession. Our goal is a workforce that is engaged, resilient and aligned with our commitment to excellence.

Looking ahead

Our practice is well positioned to adapt and lead. By maintaining an unwavering focus on quality, responsibly integrating AI and investing in our talent, we are shaping the future of trust and delivering meaningful impact to our firm, our clients and the markets we serve.



AI in auditing | RSM AI and digital audit technology

Watch Now

Confidence powered by industry insights

As AI advances, uniquely human capabilities become more critical, not less.

This reinforces what clients consistently tell us: that the value our auditors bring goes far beyond technical execution. More valuable are our insights—shaped by real-world experience across comparable businesses and deep organizational familiarity that facilitates interpreting results in the context of how a client's business actually runs. While AI-enabled tools can help flag unusual trends, transaction patterns or emerging risks, our auditors can quickly distinguish what's truly meaningful from what's merely anomalous.

The result: data-driven audits and forward-looking perspective informed by industry realities and competitive dynamics—not just algorithms.

Clients feel the difference. As one fund executive shared, "Continuity and industry expertise are crucial, and I have both with my RSM audit team. ... They have a deep knowledge of the industry and an excellent understanding of my fund ... [while] the continuity I have had has streamlined working through complex issues."

This combination of continuity and sector-specific insight allows our auditors to deliver audits that are not only compliant but truly value-driven—helping clients navigate complexity with confidence.

Tax services

Confidence powered by a century of trust

Over the past year, our clients navigated a rapidly evolving tax landscape shaped by economic uncertainty, market volatility and significant legislative change. Throughout this period, RSM tax professionals served as trusted advisors, helping clients understand new requirements, evaluate their implications and make confident decisions that balanced immediate demands with long-term objectives.

We supported organizations complying with new legislation through proactive planning, advised on tax-efficient structures for mergers and acquisitions, and helped multinational businesses align their international footprints with evolving global requirements. We also assisted in identifying available credits and incentives to improve cash flow and reinvest in growth. Collectively, these efforts enabled our clients to address near-term challenges while advancing broader strategic goals.

Driving the future of business

After a year businesses spent preparing for uncertain tax changes, the One Big Beautiful Bill Act (OBBBA) became law in July 2025. RSM quickly shifted its focus to help clients understand how the comprehensive new law would affect their organizations, enabling informed decisions ahead of the 2025 tax filing season.

Meanwhile, heightened state audit activity bolstered demand for assistance with complex information requests and reporting from our state and local tax team as tax jurisdictions decoupled from or aligned with the new federal provisions. In addition, increasing mergers and acquisitions across industries led to expanded state and local tax advisory involvement to support deal structuring.

Internationally active clients sought guidance on the immediate and long-term effects of changing tariff regimes—assessing supply chain restructuring, cost pass-through strategies and customs valuation impacts. Simultaneously, the introduction of the Pillar Two global minimum tax by the Organisation for Economic Co-operation and Development required extensive modeling, data preparation and governance support to manage effective tax rate fluctuations and compliance risks across jurisdictions. Looking forward, we continue to advise clients on how this side-by-side agreement with the U.S. may influence global business decisions.

These international developments increased the need for solid transfer pricing frameworks as clients worked to align intercompany pricing with shifting operational footprints while managing audit exposure in an environment becoming more transparent and data driven.

Driving the future of tax

As the middle market evolves, so do our tax services. Technology and AI are now central to our strategy for tax delivery. The launch of our tax digital services (TDS) team marks a significant step forward, bringing together tax technology, data and process expertise to modernize tax functions. Through platform-enabled compliance, data-driven process redesign and custom application development, TDS helps clients improve accuracy, efficiency and insight throughout the tax lifecycle.

myRSM Tax: The AI-powered tax technology ecosystem

Watch Now

Our MyRSM Tax ecosystem boosts automation, transparency and scalability, while our collaboration with tax research firm Blue J® integrates generative AI and predictive analytics into technical tax analysis. Additionally, the licensing of PartnerSight®, our proprietary enterprise partnership tax platform, enables practitioner-driven innovation beyond traditional services: we partner with businesses to technologically transform their in-house tax operations through enhanced insights and automation. Together, these initiatives reflect our dedication to combining human expertise with smart technology to deliver smarter, faster and more forward-looking tax services.

Cross-functional collaboration yields expanded tax credits

The modification and extension of the clean fuel producer credit enacted in the OBBBA made prevailing wage a top priority for one renewable fuel producer. Amid this new tax incentive for 2025, the client faced many hurdles, including setting up new compliance processes, deciphering intricate technical regulations and managing the sale of these credits.

Building on the local tax compliance team's strong client relationship, our Washington National Tax and market area energy specialists worked closely with the client's C-suite to address technical credit and regulatory issues. We developed a compliance service to help the producer track repairs and alterations performed by employees, contractors and subcontractors across multiple facilities, enabling the client to qualify for a fivefold increase in the tax credit.

Our energy credit and tax digital services teams worked together to integrate AI technology, automating the review of hours worked and wages paid and providing 24/7 support, leveraging global resources to manage the high volume of client data. The team is also assisting with due diligence to support the sale of the tax credit to interested buyers.

Throughout this process, the producer has viewed RSM as a strategic partner helping to navigate the various challenges. Following the resolution of a particularly challenging issue, the company's chief financial officer praised the RSM team for their advice and valuable insights. He emailed, "Just a quick note to thank you … for the excellent guidance you've been providing, and the hard work you and your team have been putting into our prevailing wage compliance project! … It's not always easy to find time to give recognition during the heat of the battle, but you … deserve it!".

Consulting

Converting change into competitive advantage

In fiscal 2026, RSM helped middle market clients turn market disruption into measurable value—accelerating AI adoption, hardening cybersecurity defenses, completing more than 1,100 deals and scaling managed services—by uniting our capabilities across industry expertise and technology services.

AI acceleration

RSM is deeply committed to AI. In June 2025, we announced a $1 billion investment in technology designed to accelerate AI adoption, empowering our people to provide next-level AI solutions for our clients.

We moved clients beyond experimentation to measurable outcomes by combining strategy with our deep knowledge of industry and operations. RSM focuses first on data readiness—data quality, integration and governance—so AI initiatives deploy more quickly, integrate seamlessly with existing systems and produce tailored outcomes that clients trust.

Cyber resilience and proactive security

In the past year, nearly one in four organizations reported a ransomware attack or demand, and 18% experienced a data breach, according to the RSM US MMBI Special Report: Cybersecurity 2026. RSM translated this escalating cyber risk into helping clients anticipate, withstand and recover from disruption, resulting in proactive resilience.

In 2026, our AI-driven security operations, identity-first controls and integrated governance frameworks helped reduce false alerts by 83%, eliminate over 21,000 hours of monthly manual triage, and cut initial response time to an average of just two minutes—enabling faster, more precise threat response. Beyond detection, we help clients transition from point-in-time assessments to continuous, proactive security models, especially as AI accelerates the speed and sophistication of cyberattacks.

Deal-making

Amid a complex and uneven deal environment, private equity investors and corporates remained disciplined—prioritizing assets capable of delivering tangible value in a higher-cost, higher-scrutiny environment. Working alongside them on more than 1,100 transactions, the RSM deal services team helped clarify where value could be created, reducing risk and executing cost-efficient transactions with speed and confidence. By tightly linking diligence to execution and augmenting insight with AI-enabled analytics, clients were able to move faster, make sharper decisions and realize value with greater certainty from Day 1.

Managed services

RSM Catamaran, our dynamic suite of outsourced solutions, has delivered measurable efficiencies for our clients across core business services such as finance, tax, IT, risk and human resources. Pairing AI with cloud, cybersecurity and network management has allowed clients to optimize IT across these back-office functions without expanding their internal teams. By operating as an integrated platform, Catamaran has improved speed to execution, increased accountability with fewer handoffs, and delivered measurable, cross-service value—positioning us as a strategic operating partner that clients trust to run their back office.

Phased approach

Guittard was searching for a streamlined approach that could help them ramp up production, simplify shared processes and optimize the value stream. With these goals in mind, the chocolate company called in RSM US to implement a digital twin model that would enhance the company's operational efficiency and support strategic decision making. RSM created a pivoted scenario analysis to quantify the impact of potential operating changes such as staffing and/or capital investments.

A digital twin is a virtual model of a physical system—such as a manufacturing line, warehouse or supply chain. The model allows businesses to simulate operations, test improvements and explore "what-if" scenarios without interrupting real-world activities.

RSM believed implementing a digital twin would allow Guittard to enjoy the following benefits:

- Greater visibility into manufacturing operations
- Improved decision making through data
- The ability to identify bottlenecks and inefficiencies
- Robust tools to support strategic capital investments
- Better alignment of supply chain planning with real-time operations

RSM conducted detailed assessments to understand Guittard's operations and long-term goals. This process included stakeholder interviews and iterative discovery workshops. After synthesizing all this information and real-world data, RSM built a virtual representation of Guittard's business system, modeling everything from equipment needs and demand flows to business requirements and everything in between.

The digital solution allowed Guittard to simulate, analyze and optimize various operational scenarios before implementing them in real life. In this way, the company could run through the potential outcomes of multiple options before committing to one. This insight proved invaluable to Guittard. By testing hypothetical changes in a virtual environment, Guittard avoided the cost and risk of real-world implementation issues.

Guittard finds its sweet spot with digital twin project

Watch Now

Industry focus

Powered by tailored insight

RSM's industry knowledge spans distinct industries: financial services, industrials, technology, media, telecommunications, consumer products, life sciences, healthcare, construction and real estate, nonprofit and education, government services, and business and professional services.

RSM's senior analysts dedicate significant time to analyzing trends in these industries and sharing insights about those trends with clients and their colleagues to enhance value. This insight empowers RSM to serve clients at every point of their business evolution and maintain steady support during each step.

On top of those industries, we have identified private equity, public companies, family enterprise, government contracting and foreign direct investment as the five distinct channels where our clients are most active.

Our deep understanding of both industry and channel reflects the nuances of how our clients see themselves: a technology company, for example, that also serves as a government contractor will have different needs and challenges than one that doesn't work with the government but is focused on attracting private capital to reach competitive scale.

This approach reflects how our clients operate in the real world—shaped by competition, market pressures, the regulatory environment and growth priorities. We bring this perspective to every assurance and consulting engagement, allowing us to anticipate challenges before they emerge.

By pairing extensive industry knowledge with intentional channel understanding, RSM brings a connected, holistic approach to client needs that is as complex as our clients themselves.

A client's changing growth journey

RSM combines practical insight with a relationship-led approach so our clients receive clear guidance for stronger performance; this is especially important for private equity–backed organizations, whose investors demand speed and clarity to hit growth targets.

We had a long-standing relationship with a large behavioral health platform for regular tax work for more than a decade before the organization was acquired by the private equity sponsor. During that time, our teams built a strong understanding of the health platform's operations, regulatory environment and growth goals. RSM stayed engaged with both management and the sponsor during this transition.

As the organization evolved, RSM continued to invest in the relationship with a team of dedicated private equity and healthcare specialists who remained connected to the sponsor every step of the way.

When the organization later reassessed its service model, RSM was ready, armed with extensive knowledge of the behavioral health industry, the business's operations and challenges, and the portfolio priorities of the PE firm, setting us apart. That foundation supported a successful ongoing engagement built on trust.

Middle market economic perspective

Redefining the middle market for a new era

The middle market is more resilient, dynamic and complex—and more critical to the U.S. economy than ever. For a century, RSM has remained a first-choice advisor, helping middle market leaders navigate structural economic shifts, including volatile global trade, changing labor markets and increasing operational complexity.

In fiscal 2026, RSM Chief Economist Joe Brusuelas and U.S. Economist Tuan Nguyen identified the need to modernize how the middle market is defined. RSM's updated definition provides a more accurate view of today's middle market—enabling clients to chart a better path to sustained value creation.

RSM's enterprise value roadmap (EVRM) supports this value creation and helps clients see their businesses more clearly within an increasingly competitive and uncertain business environment. By providing a 360-degree view of operations, the EVRM helps middle market leaders better understand how external forces intersect with strategy, risk and performance—making complexity more manageable and decision making more informed.

Throughout fiscal 2026, RSM's economists and industry analysts also delivered timely insights, forward-looking analysis and proprietary, data-driven research to help middle market firms understand the implications of shifting economic forces.

Leading the middle market conversation

As tariffs, interest rates and the integration of AI continue to challenge middle market businesses, RSM has been advancing the middle market conversation among executives, policymakers and the media.

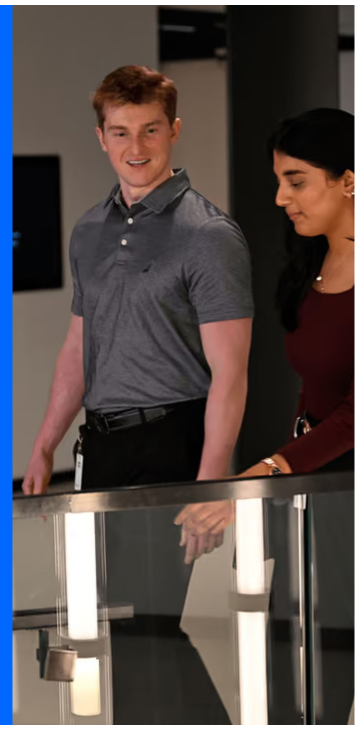
The RSM US Middle Market Business Index (MMBI) anchors the conversation by capturing how U.S. executives across a wide range of industries feel about current economic conditions. The quarterly index is in its 11th year and includes special reports on topics such as U.S. workforce issues and cybersecurity. As of March 2026, the index reflects RSM's updated, more expansive definition of the middle market.

These insights and analyses earned RSM multimedia coverage from major news outlets such as The New York Times, Bloomberg, MarketWatch, Yahoo! Finance and The Guardian, as well as industry trade publications.

RSM Industry Eminence Program

RSM's Industry Eminence Program, originally designed as a rotational program to build industry expertise, has evolved to develop full-time industry strategists who deliver forward-looking insights and identify real-time RSM service delivery to our premier clients.

Going forward, the Industry Eminence Program will condense to two years, continuing our tradition of accelerating industry subject matter expertise while simultaneously providing a high-quality talent experience and creating a pipeline for future dedicated industry strategists who are the faces of RSM's industry intelligence, bringing insight directly to clients.



RSM's Commitment to stewardship

Powering positive impact through responsible business

We carefully account for our impact on the communities we serve. RSM is fully committed to advancing innovative strategies that support our people and our clients, while preserving our planet's precious resources today and well into the future.

Letter from Ty Beasley

Dear clients, colleagues and friends,

Stewardship is at the heart of how we grow, lead and serve. I'm proud to chair our enterprise stewardship committee and share an update on our continued commitment to leaving our firm, our communities and our planet better than we found them.

"Ultimately, stewardship is a collective effort. When we show up for one another and lead with purpose, we create lasting positive changes. Together, we will build a future we can all be proud of."

Ty Beasley, Chief Talent Officer and Enterprise Stewardship Committee Chair

Our commitment to community engagement remains unwavering. Through volunteerism, philanthropic efforts and financial support from the RSM US Foundation, our people made a measurable impact in the communities where they live and work. Our continued collaboration with Junior Achievement USA and other nonprofits highlights our shared belief in supporting future leaders and expanding economic opportunity—one community at a time.

Enhancing our approach to environmental sustainability is ongoing. This year, we continued to implement responsible business practices, including taking steps to reduce our carbon footprint. While sustainability is a long-term journey, we remain committed to ongoing evaluation, transparency and meaningful progress as we work to reduce our environmental impact.

We are focused on continued transparency. We continue to evaluate sustainability for our firm, with support from RSM's sustainability consulting team. To prepare for evolving sustainability requirements and ensure alignment with forthcoming standards, we are refining our reporting. As a result, this year's annual impact report reflects a streamlined approach with several sustainability topics covered at a higher level or included within the narrative rather than in extensive indexes. While the format differs, our commitment to transparency remains unchanged.

Ultimately, stewardship is a collective effort. When we show up for one another and lead with purpose, we create lasting positive changes. Together, we will build a future we can all be proud of.

Sincerely,

Ty Beasley, Chief Talent Officer and Enterprise Stewardship Committee Chair

RSM US Foundation

Letter from Donna Sciarappa

Dear clients, colleagues and friends,

As I reflect on the past year, I'm incredibly proud of all we've accomplished together. 2025 marked a meaningful milestone for us, underscored by the newly enhanced mission of the RSM US Foundation:

"Empowering confident futures for youth ... one community at a time."

Our focus on holistic youth empowerment through local engagement positions the Foundation to make an even greater difference in the years ahead, reflecting the commitment to community programming in education, hunger, housing and health.

Looking ahead, I'm energized by the opportunities before us and inspired by the momentum our people continue to create in the communities we serve.

I am excited to share the 2025 featured impacts, which highlights the meaningful ways our teams showed up in our communities.

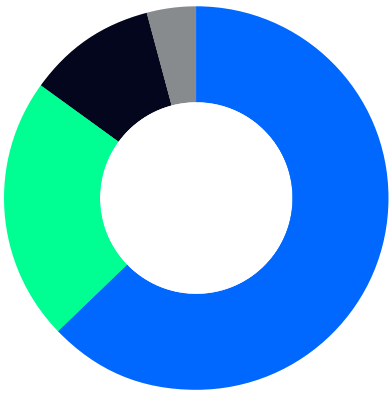
Sincerely,

Donna Sciarappa, President and Chair of the RSM US Foundation

By the numbers

2025 charitable giving

2025 charitable giving



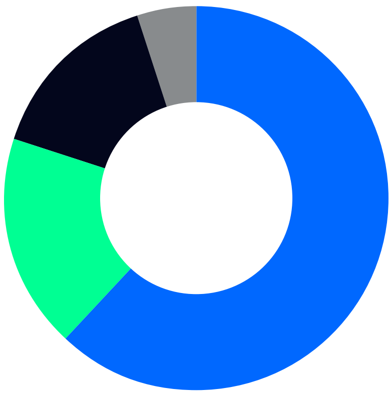
The RSM US Foundation, our firm and our people contributed $8.1 million to charitable causes in 2025.

$8.1M

- **63%** Local giving and programs
- **22%** University giving and scholarships
- **11%** National charities
- **4%** Other

The reporting period is for Jan. 1, 2025, through Dec. 31, 2025, for all RSM entities (RSM US LLP, RSM Canada LLP, RSM US and Boston Foundations).

RSM US Foundation cumulative charitable giving



Since it's launch in 2015, the RSM US Foundation's charitable activities total $58.8 million to support causes aligned with our mission.

$58.8M

- **62%** Local giving and programs
- **18%** University giving and scholarships
- **15%** National charities
- **5%** Other

Reflects RSM US Foundation charitable giving since its launch in 2015 through Dec. 31, 2025.

2025 featured impacts

Empowering confident futures for youth ... one community at a time

1,900 youth supported by RSM volunteers through the Boys & Girls Clubs of America Life & Workforce Readiness Program

In 2025, RSM empowered confident futures for more than 1,900 youth across seven clubs through BGCA's Life & Workforce Readiness program. RSM volunteers introduced students to career exploration and financial literacy, as well as essential soft skills such as communication, teamwork, adaptability and professionalism.

Students visited RSM offices and learned about a wide range of careers, opening their eyes to the many opportunities available within professional services. Each interaction between RSM volunteers and club youth was thoughtfully designed to build real-world skills and boost confidence as students prepare for life after high school.

90 semesters of college supported by RSM US Foundation scholarships

In 2025, the Foundation expanded its scholarship program, awarding 35 new students across the U.S. and Canada access to up to $440,000 in scholarship funds over the term of their awards. In addition, the multiyear First Generation scholarship continued to support returning recipients, providing eligible students with up to three consecutive years of funding. Together, these scholarships represent a life-changing investment in students' educational journeys and long-term success.

"Receiving the RSM First Gen Scholarship means so much to me. It helps lift a huge financial burden and lets me focus fully on my goals. I'm excited to keep pushing forward and eventually give back, just like RSM is giving me this opportunity." **—Pharell Assizo,** Bentley University

"Very grateful to RSM for this scholarship and the support they are providing to aspiring accountants like me. It reminds me that hard work does not go unnoticed and inspires me to keep pursuing my passions to make a difference!" **—Joy Lin,** University of Toronto

120 charities supported by the Community Impact Fund

The Community Impact Fund supports the passion our professionals demonstrate for giving back through one-time grants and team fundraising matches. In 2025, the fund supported more than 120 charities and generated more than $650,000 in giving, while expanding for the first time to award 15 members of the RSM alumni network.

By engaging alumni in grantmaking for youth-focused organizations aligned with their personal priorities, RSM strengthened shared values, broadened community impact and deepened its lifelong bond rooted in purpose and stewardship.

100 colleges and universities supported through university giving programs

Education is central to empowering confident futures for youth, and RSM supports students and faculty through its university giving programs. In 2025, more than 100 colleges and universities received grant funding.

Support from the University Impact Fund helped bridge critical funding gaps for Bentley University's Volunteer Income Tax Assistance program, which combines hands-on learning with meaningful community service. Led by three Bentley alumni, the program selects 20 accounting students annually to provide free tax preparation to individuals from low- to moderate- income households.

In 2025, students helped file more than 300 federal and state tax returns, returning over $545,000 to the local economy, an impact that would not have been possible without RSM's support.

62,000 volunteer hours logged through our Dollars for Doers program

Through Dollars for Doers, when our people give their time, RSM doubles down by providing grant dollars that expand community impact. In 2025, 62,000 volunteer hours flowed through the program.

Individual feature: Roman Hund, managing director, earned the maximum Dollars for Doers grant of $2,400 in 2025 and has generated a total of $8,200 for the Air Force Association's CyberPatriot and StellarXplorers youth programs through his individual volunteer service since 2020. Hund's commitment to supporting the Air Force Association creates a strong connection to VALOR, RSM's veteran-focused employee network group, and highlights the impact of employee volunteers in our communities.

Team feature: In 2025, RSM embedded volunteer service into its new-hire conferences, often the first firmwide experience for new professionals, bringing the value of stewardship to life through hands-on community engagement. More than 2,000 new employees contributed over 3,000 volunteer hours. They generated $48,000 in grants supporting CASA of Kane County, a northern Illinois group advocating for children who have experienced abuse or neglect, and the backpack program of Feeding America, which provides children with nutritious meals to take home when school meals are unavailable.

69% of employees and **95%** of owners participated in the Power of Love program

RSM's flagship employee engagement initiative, the Power of Love program, brings stewardship to life through local fundraising and volunteer efforts that positively affect youth.

Hannah Simard, a supervisor in RSM's New York office, has openly shared her experience of losing a parent as a child and how that loss shaped her commitment to supporting other youth navigating similar grief. One organization that played a transformative role in her life is Circle Camps, a summer camp that provides full-scholarship programming for children in grades three through 12 who have lost a parent.

In 2025, RSM's New York office honored that connection by awarding Circle Camps a $97,577 grant through its Power of Love campaign—directly supporting a charity that made a profound difference for Hannah, her sister and countless other families. It's a powerful example of how we can amplify the passion of our people and help them give back to the communities and causes that shaped them.

"I am so grateful for RSM's leadership in recognizing employees as whole people, not simply for 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,** Supervisor, RSM US

31,253 students in **1,277** classrooms were taught the JA Take Stock in Your Future program and **12,916** students participated in the JA Stock Marketing Challenge during the 2024-2025 school year.

In 2025, RSM continued empowering confident futures for youth by renewing our commitment to Junior Achievement's JA Stock Market Challenge, a fast-paced, high-energy competition that we originally helped bring to life.

Our continued investment supports new AI-driven features and enhanced game elements, giving students an even more dynamic and engaging experience.

The impact reached a new level as well. The JA Stock Market Challenge is now recognized nationally at Future Bound, JA USA's premier event celebrating student leadership, innovation and entrepreneurship. Thanks to the Foundation's support, JA USA has elevated the challenge to one of only four national competitions, positioning it as a signature experience for students across the country.

It's a fun, exciting and meaningful way RSM continues to fuel curiosity, build financial confidence and inspire the next generation of leaders.

Junior Achievement local program: **35** offices and **33** RSM employees and owners serving on local JA boards

RSM's continued support of Junior Achievement gained momentum in 2025 with more than 35 offices across the U.S. and Canada supporting their local chapters through volunteerism, grant and sponsorship funding, and board service.

In 2025, RSM's Toronto office was proud to support JA's virtual Career Discovery Series, which features career exploration events that empower students to plan for their futures.

Through this program, more than 600 students from across Central Ontario participated in a live virtual webinar, where they had the opportunity to hear from four RSM professionals across various lines of business. The panelists shared insights into their career paths, educational journeys, challenges and lessons learned along the way.


RSM
Colgate


Team 8
Money Magnets
Lincoln High School
JA STOCK MARKET

Environmental impact

Cultivating sustainable communities

Environmental sustainability is woven into the culture of RSM through our core value of stewardship. It drives our progress, fosters continual improvement and empowers us to create meaningful impact. It ensures that we leave our communities and the planet better than we found them. By championing positive environmental practices, we uphold our mission to cultivate sustainable communities that enhance the wellbeing of current and future generations of our people and our clients.

Our environmental strategy includes:

- Infusing environmental stewardship into our workplace culture
- Integrating environmental sustainability into our everyday business operations
- Reducing and monitoring our greenhouse gas emissions
- Collaborating with strategic ecosystems

Learn more about our environmental strategy >

View our greenhouse gas emissions statement >

Leveraging RSM's advisors to stay on a sustainable path

The RSM sustainability advisory practice helps clients strengthen environmental, social and governance (ESG) reporting; manage climate and supply chain risks; and align sustainability initiatives with business strategy. The team provides end-to-end support, from emissions calculations and reporting readiness to third-party risk, tax credit opportunities and sustainability technology, helping clients make informed decisions and protect enterprise value.

A recent example is the practice's support for a middle market client facing rising regulatory and investor expectations for credible, decision-useful ESG data. By improving emissions data quality and enhancing governance over sustainability disclosures, the client achieved more reliable reporting, assurance readiness and stronger stakeholder confidence.

The practice also assists with RSM's emissions data review and ESG disclosures, reinforcing accuracy and accountability in how RSM reports its environmental impact.

Environmental impact

2025 Featured Impacts

92%
of offices have local eco-champions across RSM geographic locations (U.S., Canada, India, El Salvador)

2,340+
volunteer hours logged during eco-events

$35,375
in Dollars for Doers grants to KidsGardening from the RSM US Foundation

75+
communities positively impacted through gardening and cleanup events

80+
eco-focused events held

Sustainable operations

Driven by the deep personal passion for sustainability and home composting practices of Workplace Experience Support Manager Gowri Srinivas, RSM offices in India have made eliminating plastic a top priority. Thanks to Srinivas' leadership, every office removed plastic water bottles, installed reverse osmosis (RO) filtration systems and introduced glass jugs and cups in all conference rooms, creating a lasting cultural shift toward reducing waste.

Beyond this, the India teams have introduced several thoughtful sustainability practices: All offices are now composting in their on-site cafeterias and using a food ordering app to help reduce on-site cafeteria waste; gifts for Diwali, the Hindu festival of lights, were sourced from vendors that avoid plastic packaging; rechargeable batteries replaced disposables in all automatic soap dispensers; and offices adopted recycled or bamboo-based supplies.

Together, these efforts show how sustainability has become part of daily life across RSM offices in India.

415+ youth benefit from garden build honoring late assistant principal

Our RSM Birmingham, Alabama, office came together for a meaningful garden build through our relationship with the nonprofit KidsGardening to help a community with significant need. At Wylam Elementary School, the RSM team transformed an underused outdoor area into a hands-on learning garden that helps students connect with the environment and gain an understanding of the farm-to-table process and the importance of making healthier food choices.

The day carried even deeper significance as the garden was dedicated to a former assistant principal who had recently passed away. It was an incredibly special experience for everyone involved.

This event reflects the heart of who we are: coming together to make a tangible difference, especially where the need is greatest.

685+ volunteer hours dedicated to community clean up

Our RSM Boston office has built a strong relationship with the City of Boston's Office of Civic Organizing, deepening our connection with a leading community organization and expanding the impact we can make together. This past fall, we hosted our annual Trash Dash, focusing our efforts on cleaning up the Charlestown area.

> ***"RSM has been a valued collaborator with the Mayor's Office of Civic Organizing in supporting neighborhood cleanups across Boston, demonstrating a genuine commitment to community stewardship. Their volunteers consistently show up ready to work, helping strengthen neighborhoods while fostering meaningful connections with residents."***
>
> **Nathalia Ferreira da Silva**, Director, Mayor's Office of Civic Organizing, Boston

This relationship has also created opportunities for meaningful learning. The Office of Civic Organizing visited our Boston office to lead a home-composting session, inspiring many of our Boston colleagues to begin composting at home.


RSM


The Power of