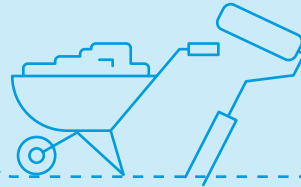
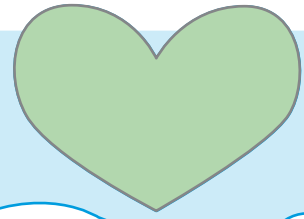


2021 RSM US Foundation

Giving Report

Building tomorrow's middle market leaders **today**

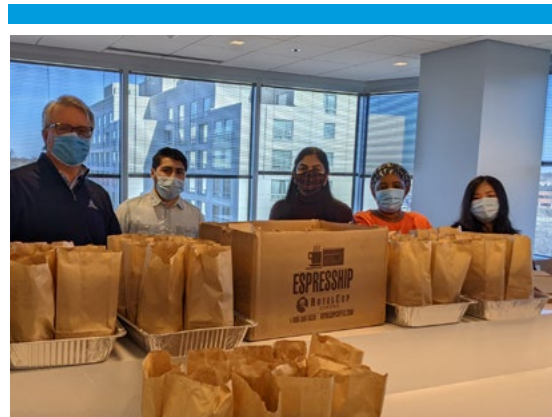


THE POWER OF BEING UNDERSTOOD
AUDIT | TAX | CONSULTING

RSM US FOUNDATION



RSM



Welcome

2021 was a challenging year. We saw an ongoing pandemic, continued racial and political unrest, inflation and other challenges that led to ongoing uncertainty for many. All of these highlight the need for stewardship.

At RSM, we define stewardship as leaving things better than we found them. And it's our commitment to stewardship that led us to establish the RSM US Foundation in 2014 as part of our giving strategy. The RSM US Foundation is dedicated to building tomorrow's middle market leaders today by enhancing educational outcomes and supporting organizations committed to creating stable environments for youth.

From Birdies Fore Love to our annual volunteer event, from our support of Junior Achievement to joining [Pledge 1%](#), we are honored through the RSM US Foundation to be able to give back to those in need in the communities where our people live and work—across the United States and in Canada.

As always, we'd like to express our sincere appreciation to all of our people, clients and friends of the firm who share our commitment to stewardship and help us make a positive difference in the lives of so many in our communities. Together, we make our communities stronger.

THANK YOU.

Sincerely,

Doug Opheim,
Chairman of the RSM US Foundation

2021 RSM US Foundation

Board of Directors



Doug
Opheim



Michael
Greer



Anthony
Boucher



Sudhir
Kondisetty



Jackie
Dammeier



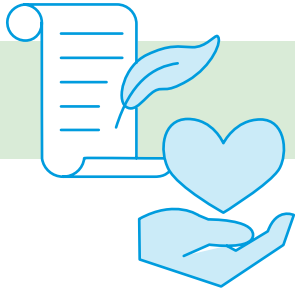
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Chuck
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Waterman



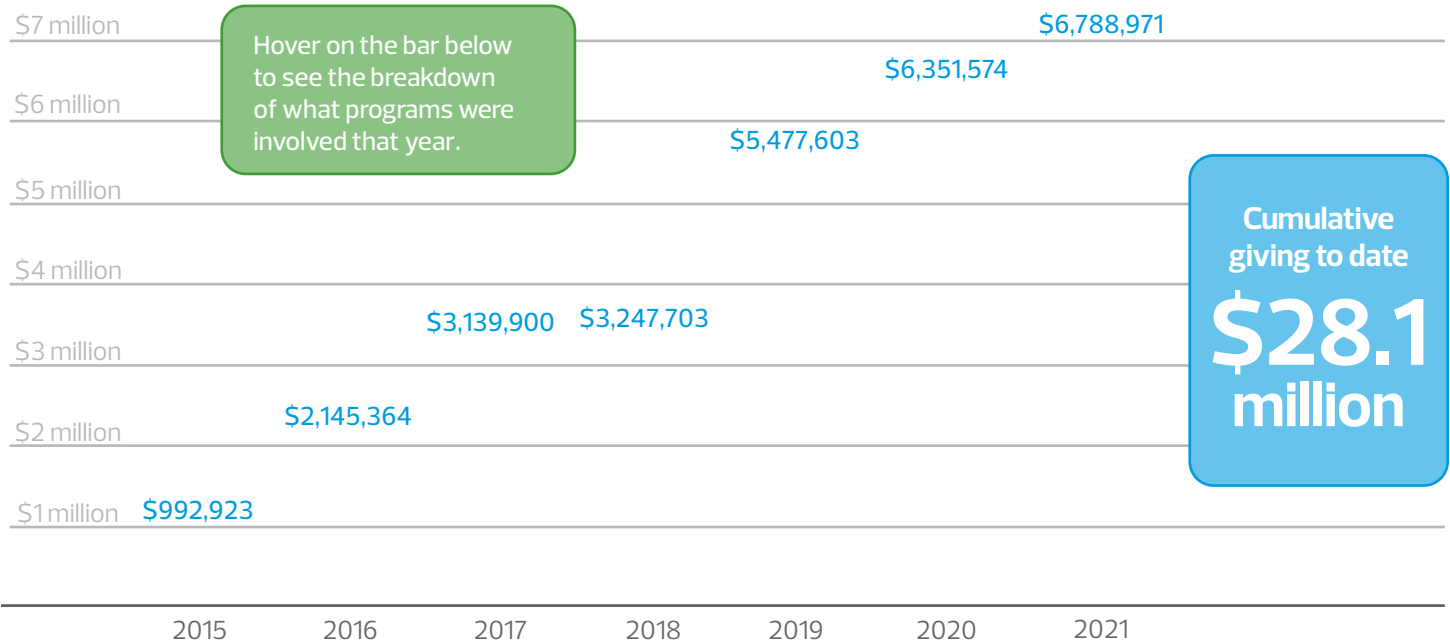
Our Mission

In 2014, we established the RSM US Foundation to enhance the giving already happening in our offices across the country. As 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

By The Numbers

RSM US Foundation – Giving by year





Supporting our communities through **Local programs**

The Power of Love

The Power of Love combines two of RSM's marquee stewardship programs—Birdies Fore Love and Volunteer Week—into a powerful platform to support our local communities.



Birdies Fore Love

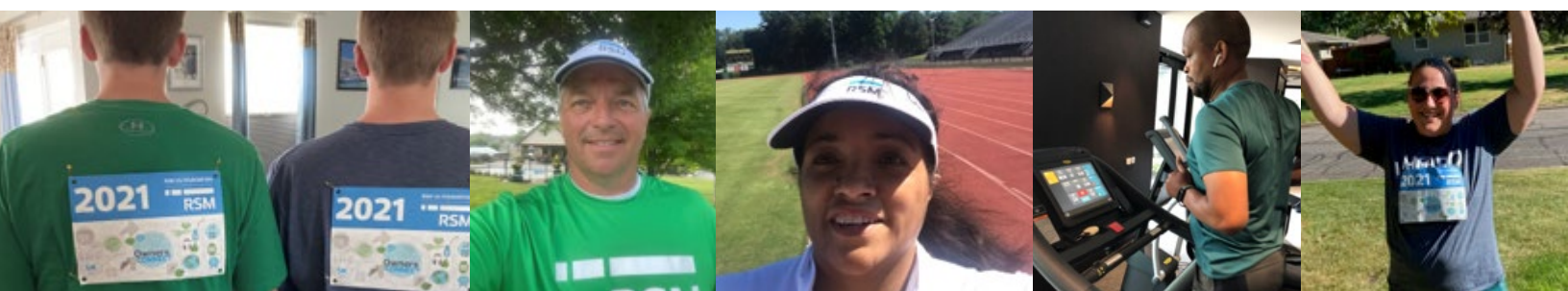
Each year, RSM employees, owners and friends give their time, dollars and energy to support the foundation's largest fundraising program, [Birdies Fore Love](#). Birdies Fore Love is tied to [The RSM Classic](#), a PGA TOUR event hosted by the Davis Love Foundation for which RSM is the title sponsor. Through the fundraising program, our local offices raise funds for charitable organizations committed to supporting youth. These efforts are enhanced by matching donations from the RSM US Foundation.



Participation by our partners, principals, employees, clients and friends in various fundraising efforts, coupled with strong financial support from the RSM US Foundation, led to a record-breaking \$4.8 million donation to 75 charitable organizations in communities across the United States and Canada where our people live and work.

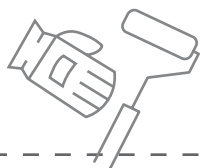
Offices were challenged to host a variety of events this year, both in-person and virtual, to engage our people. RSM's Atlanta office, for example, hosted a competition where partners made milkshake recipes of their choice, and all attendees participated in a taste test using their dollars to vote for their favorite. Proceeds benefited the East Lake Foundation in Atlanta. The office heard stories from students of the East Lake Foundation about their cradle-to-college program and the impact this college- and the career-readiness program had on furthering their education.

At our RSM Owners' Meeting, over 750 owners raised more than \$115,000 for local Birdies Fore Love charities through the RSM US Foundation Charitable 5K. This virtual 5K brought together over 300 partners, principals and their families across the United States and Canada as they logged in to an app and stepped out their front door or hopped on a treadmill to participate.





Volunteer Week



Volunteer Week is our 11-year tradition of giving back to our communities through hands-on and virtual volunteering. In 2021, more than 4,000 RSM employees and their families participated in more than 100 volunteer events across the United States and Canada. Supporting 91 charitable organizations, employees and their families helped their communities by assembling back-to-school backpacks, packing meals for those in need, landscaping at local schools, creating pickleball courts at local Boys and Girls Clubs and other activities.

Local highlight:

Orange County, California

Celebrating a 10+ year relationship in Orange County, our people returned to support Olive Crest, an organization dedicated to preventing child abuse by providing resources for children and families, as well as educating at-risk children.

Because of the longstanding relationship, Orange County and Olive Crest have worked together to create activities for more than 100 of our volunteers year after year, expanding our impact on the organization.

"They [RSM volunteers] are amazing and so dedicated to wanting to help our children," said Kerri Dunkelberger, executive director of Olive Crest, Orange County. "I've been so impressed with how many of the Irvine RSM employees want to get involved and how they are open to hearing more about how we at Olive Crest help and serve local children. They inspire all of us to do even more for our kids and families. We are blessed to have RSM as one of our very best business allies and look forward to continuing our partnership for many years to come!"

RSM offices that select local charities aligned with the RSM US Foundation mission are able to enhance their gifts of service with donations from the RSM US Foundation's Dollars for Doers program. communities that care for them. Thank you, RSM!"

Local highlight:

Red Deer, Alberta

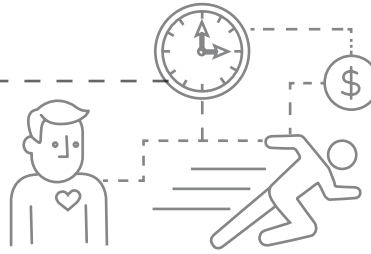
Personal ties connected our people in Red Deer, Alberta, Canada, to Aspire Special Needs Resource Centre, a charitable organization that provides hope to children with special needs, the families who love them and the communities that care for them.

Throughout Volunteer Week, 51 of our people and their families painted, installed vinyl plank flooring, removed carpet, put together packages for the Centre's staff, created and assembled "welcome back" gifts for staff members, and participated in many other volunteer activities.

"Aspire is truly grateful for the energy and enthusiasm shown by RSM volunteers during Volunteer Week," said Tanza Hovelkamp, development coordinator at Aspire. "Our staff returned to a bright, well-organized building this fall because of the dedication of the volunteers. Their help with painting, organizing and even laying new flooring was vital to completing our projects this summer. Aspire staff can now focus on fulfilling our mission of providing hope to children with special needs, the families who love them and the communities that care for them. Thank you, RSM!"

Dollars for Doers

The foundation provides grants to match employees' individual or team volunteer time serving charitable organizations, including time donated during Volunteer Week and conference stewardship events that align with the foundation's mission. Dollars for Doers has grown its impact each year since launching in 2015, as more individual employees and groups of partners, principals and employees leverage the program. Our people continue to have a positive effect on our communities, supporting the next generation of leaders. For example:



Team impact:

Boston office

Our Boston office turned their volunteer hours this year into a \$1,200 Dollars for Doers team grant to go to the Warren Prescott (WP) School. Various groups from RSM have volunteered at WP since 2016 when the school was selected as the office's beneficiary of its Birdies Fore Love fundraising efforts. This past year, our people took part in an annual cleanup day before the beginning of the school year as well as a holiday drive where they supplied more than 50 students with holiday gift cards and another 25 with holiday meals.

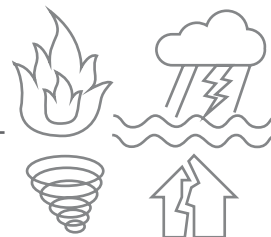
Individual impact:

Brian Healy (Detroit)

The Oakland Chargers Baseball Club (OCBC) recently received a \$1,100 grant through the RSM US Foundation's Dollars for Doers program, thanks to Brian Healy's volunteer hours. The OCBC was formed in Detroit in 2005 to develop local players and teach them the necessary skills to play the game. As an assistant manager for the baseball club, Brian spends many hours a week helping with practices, scoring games and supporting the local teams. "When I first heard about this [Dollars for Doers] program, I was thrilled," said Brian. "I spend a lot of time coaching my kids, and the idea of being able to leverage that volunteer time to monetarily help a specific organization is very rewarding. RSM was eager to make the donation, and they moved quickly when processing my application and providing the grant to the organization. With the rising cost of training, facilities, umpires, field rentals, etc., it would be impossible to provide a positive experience for these young baseball players without the support of organizations like RSM."

Disaster Relief Fund

The foundation's Disaster Relief Fund was activated following five federally declared disasters in 2021, including Hurricane Ida and severe winter storms in Texas. The fund was made available to employees in affected counties through an application process. It provided financial support directly to those who had a financial need as the result of federally declared national disasters.



"This is absolutely amazing that we do this [disaster relief] here at RSM. It's so thoughtful and shows that RSM genuinely cares about and takes stock in its people and clients. Our home was just on the edge of the deadly tornado, but thankfully no one was hurt here at our home. I have some siding damage, but nothing I can't handle with a ladder, hammer and nails. Thank you for checking in on my family and me!"

—Client account manager, Springfield, Illinois



Supporting our communities through **National charities**

Boys & Girls Clubs of America



In July 2021, we announced our support of Boys & Girls Clubs of America's mission with a \$200,000 donation to help implement the nonprofit's workforce readiness strategy to help young people build the skills they need to succeed after high school. Pilot programs in Chicago; Orlando, Florida; Washington, D.C.; and Irvine, California, began in the fall.

Keenly aligned with the RSM US Foundation's mission of building tomorrow's middle market leaders by enhancing educational outcomes, Boys & Girls Clubs of America's focus on workforce readiness for kids and teens helps prepare youth for success in their careers and lives. Local clubs provide experiences and opportunities for youth to learn and practice life skills such as resume writing and interviewing, and build essential skills such as teamwork, collaboration and problem-solving.

In keeping with RSM's focus on stewardship, our [Generations employee network group](#) uses funds they raise through Mentor Awareness Month each January to support Boys & Girls Clubs of America, and the RSM US Foundation proudly matches those funds. We have also supported Boys & Girls Clubs through our Birdies Fore Love program, Volunteer Week and other initiatives.

"Thank you to RSM and its employees for supporting Boys & Girls Clubs of America as we continue our commitment to offering youth the resources they need to reach their full potential. It is through partnerships like this that we are able to fuel programs, experiences and opportunities that empower young people to meet the workforce challenges of tomorrow."

— Chad Royal-Pascoe, Acting Senior Vice President, Resource Development, Boys & Girls Clubs of America

Junior Achievement

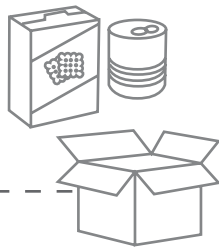


The foundation expanded its support of one of our national charities, Junior Achievement (JA), by building upon an initial three-year commitment and investment in the JA Take Stock In Your Future program and JA Stock Market Challenge, unveiled in 2020. RSM's support of these programs is helping to fill a critical gap in education by demystifying the investment process for students. By teaching students how to manage their financial futures, RSM and JA are providing them with critical life skills that will help them realize promising and financially secure futures.

Our partnership with JA not only empowers young individuals to become confident, successful future business leaders, it also provides opportunities for RSM professionals to share their knowledge and skills in their local communities. RSM employees and partners who volunteer with JA serve as mentors to students and help connect classroom concepts to real-world applications. The foundation supports our people's stewardship efforts with JA by providing grants, matching employee volunteer time through Dollars for Doers, and matching individual donations, as well as team fundraising efforts.

"Thanks to RSM employee's efforts, more students in our community will learn about financial literacy, entrepreneurship, workforce readiness, personal and global economics, the importance of staying in school, and many more practical messages designed to help prepare the business and community leaders of tomorrow" said Mariana Furchi Sly, senior vice president of development for Junior Achievement of Greater Miami, Inc. "RSM's involvement makes a difference and the more programs we provide, the more lives we touch—the better prepared our young people will be."

Food Banks



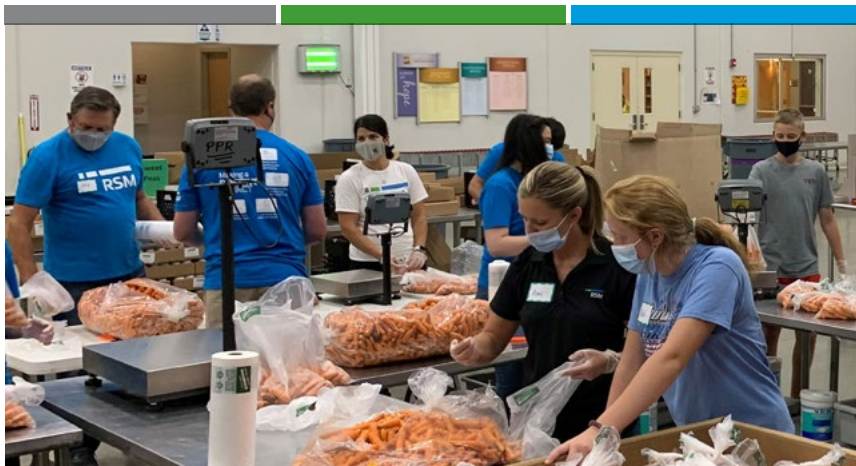
The RSM US Foundation is dedicated to supporting organizations committed to providing a stable environment for youth in the areas of hunger, housing and health, to help them succeed in education.

With that in mind, the foundation donated \$500,000 to 76 food banks across the United States and Canada in 2021. The local leaders of the firm's 87 offices selected the food banks from within their communities, with donation amounts calculated based on the number of people in each office. A few of our people, inspired by the foundation's efforts, personally contributed an additional \$7,500.

These donations bolstered the \$1.8 million donation made by RSM and the RSM US Foundation to food banks in 2020, near the onset of the COVID-19 pandemic.

Proper nourishment is crucial for children to reach their full potential, and the pandemic had a disproportionate adverse effect on some of North America's most vulnerable populations. By extending our support of local food banks, we positively affected our communities by helping those who need it most.

This is one important way the RSM US Foundation and RSM's people are helping to build tomorrow's middle market leaders today.



"Thank you so much for your ongoing generosity to Cultivate. Our goal for the 2021–22 school year is to **provide 1,000 food-insecure students** in our area with six frozen meals each weekend to bridge the gap between Friday lunch and Monday morning breakfast. Thanks again for your donation! We are honored to have you as a partner in our mission!"

Todd Zeltwanger, Cultivate Culinary,
South Bend, Indiana

"We received RSM US Foundation's generous gift—thank you for your continued generosity and kindness. Did you know that the RSM US Foundation has helped Harvesters to **provide over 103,000 meals** since your first gift in 2015? Incredible!"

Caitlin Wilde, Harvesters—The Community Food
Network, Kansas City, Missouri

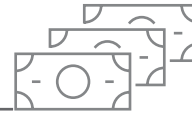
"I was notified of the generous gift that we received from the RSM US Foundation last week and wanted to say THANK YOU! RSM was so generous last year at the height of the pandemic, and we are grateful for this recent donation as food insecurity continues to be a significant problem both in the Washington, D.C., metro area and around the country. Since COVID, the Capital Area Food Bank has worked **with our partners to distribute 67.5 million meals**—more than double what we would distribute in an average 12-month period prior to the pandemic."

Emily Lauer-Bader,
Capital Area Food Bank



Support to our Universities

University Giving Match



The RSM US Foundation is committed to amplifying the efforts of our passionate partners, principals and employees' support of colleges and universities. One way in which we do so is through our University Giving Match program that provides a match of our people's fundraising efforts to create scholarships, programming and departmental support to colleges and universities that are important to our people and firm. The RSM US Foundation board of directors approved five new match requests in 2021 for the following schools: St. Ambrose University, Temple University, the University of Houston, the University of Illinois at Urbana-Champaign, and North Carolina State University. More to come as many of these fundraising efforts will carry on for multiple years before they've reached their goals.

One of this year's successful match efforts provided a deeper meaning for many of those involved. In January 2021, RSM Partner Pete Wilson unexpectedly passed away. Pete had been working with the RSM US Foundation to create a scholarship endowment at North Carolina State University to help economically disadvantaged, underrepresented minority students studying accounting, an effort that he and his wife Trish were passionate about supporting.

To continue his efforts, Chief Risk Officer Bruce Jorth and the RSM US Foundation stepped in to bring Pete's vision to life by creating the [RSM Peter S. Wilson Jr. Memorial Endowed Scholarship](#) where his amazing family, friends and colleagues donated \$75,744. Topped off with the foundation's match of over \$75,000, the endowment totals more than \$150,000 and will go directly to deserving students at North Carolina State University to carry on Pete's legacy and efforts indefinitely.



“He [Pete Wilson] envisioned making a positive impact by helping deserving students complete their accounting degrees. Peter was so enthusiastic as this moved forward at N.C. State in collaboration with RSM. Thank you, RSM, for making this happen.”

— Trish Wilson, Pete's wife

Active Minds



This past year we donated [\\$100,000 to Active Minds Inc.](#), the nation's leading nonprofit organization supporting mental health awareness and education for young adults.

This gift continues RSM's support of Active Minds' mission to end the silence and change the conversation about mental health for everyone, focusing on young people under the age of 25. RSM's support of Active Minds began in 2020 with the donation of \$50,000 to create the organization's online tool, Behind the Backpacks. These additional funds will be used to support chapter activation of [Behind the Backpacks and integration into Active Minds' "Send Silence Packing®"](#) exhibit, which travels to colleges around the country to end the silence that surrounds mental health and suicide, and connects students with resources for support and action.

In addition to this donation, we have committed \$100,000 to Active Minds in both 2022 and 2023.

“Send Silence Packing has traveled the country for more than a decade to inspire action and change the culture around mental health and suicide. Our latest installment of the exhibit, Send Silence Packing: Behind the Backpacks, has given thousands a new immersive experience into the full-spectrum impact of suicide. This generous support from RSM will help us to continue to integrate this interactive exhibit into our comprehensive suicide prevention efforts to reach young adults with life-saving messages wherever they are—on campuses, in the workplace and online.”

—Becky Fein, Director of Engagement and Training, Active Minds.



University Impact Fund

The University Impact Fund provides financial support for U.S. and Canadian colleges and universities to directly benefit the next generation of professionals. Funding supports programming, events and activities that help schools empower future professionals, often with an emphasis on women, diversity and inclusion, technology, and innovation. Launched in fall 2019, RSM employees and partners can apply for monetary support to a school of their choosing. These two grants showcase how our people give back to the communities in which we live and work through university giving.

Impact Highlight

In fall 2021, through the University Impact Fund, our people supported Auburn University with the relaunch of its National Association of Black Accountants (NABA) chapter. The nearly \$5,000 donation covered all NABA members' first-year dues, a relaunch/kickoff event and a regional conference.

“RSM has played a pivotal part in relaunching NABA at Auburn University. Through their generous grant, we were able to host a successful kickoff party in the fall and launched a tutoring program for NABA students, which is available four evenings per week. Our students value the connections they've made with RSM employees through office visits and events, and we look forward to fostering those relationships in the future. Thank you, RSM!”

—Mollie Mathis, Assistant Professor,
Auburn University

Impact Highlight

RSM's legacy of stewardship with University of Washington students and faculty spans several decades and has seen increased involvement around our philanthropic support during the last 10 years. Last fall, through the University Impact Fund, the foundation donated \$10,000 to U.W.'s Foster School of Business, funding a fall 2021 mentorship series for students in the university's Consulting and Business Development Center's Foster Consulting Program.

The fall mentorship series offered 25 RSM professionals the opportunity to refine and improve their leadership and client interaction skills and engage with the small business community in Washington state. It also provided consulting, tax and audit professionals from across the West region the opportunity to develop their own personal skills while connecting with future RSM talent at the same time.





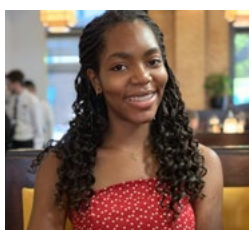
Supporting to our Middle Market Leaders of Tomorrow

CDI Impact Fund



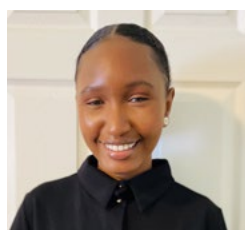
In 2021, we continued our tradition of helping students realize their dreams by empowering them to be their authentic selves through our CDI Impact Fund. The fund was created to attract and support underrepresented populations as they prepare for careers in public accounting, technology or business, and to support organizations committed to providing stable foundations for youth to help them excel in education. It awards the Power of Inclusion Scholarship in honor of Richard Caturano, the firm's first chief diversity officer, to student members of various diverse professional organizations.

This year's two Power of Inclusion scholarship recipients, [announced in May 2021](#), received a \$10,000 grant each toward their tuition:



Alexia Ayuk

Accounting and Operations
Management and Business
Analytics, University of
Maryland



Fatoumata Binta Balde

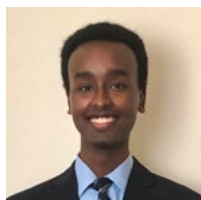
Accountancy, University of
San Diego

"Receiving the RSM Power of Inclusion Scholarship means to me that I have been granted an investment to be the most authentic version of myself in my professional journey and provide others with that same opportunity."

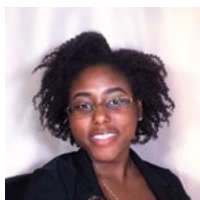
"Accepting the Power of Inclusion Scholarship means that I'll be able to relentlessly continue my academic journey and grow as a person and a student. Further, by receiving this scholarship, I hope to inspire students from underserved communities to work hard and pursue their dreams. Thank you so much, RSM!"

In 2021, the foundation also awarded 10 scholarships of \$5,000 each to student members of two diverse professional organizations: the National Association for Black Accountants (NABA) and the Association of Latino Professionals for America (ALPFA). These scholarships were awarded to students pursuing undergraduate degrees in accounting, business or technology and are designed to provide support to students from underrepresented populations. The scholarship recipients were announced in June (NABA) and August (ALPFA) of 2021 and included the following:

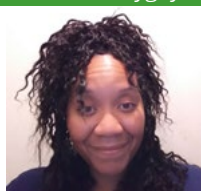
NABA scholarship recipients



Anteneh Tseygaye



Jakiyla Height

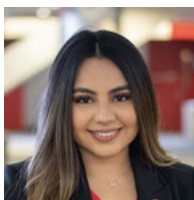


Sophia Scott



Stacy Nedd-Guy

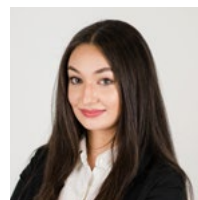
ALPFA scholarship recipients



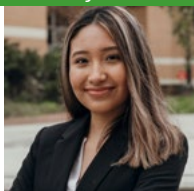
Ashley Benitez



Diego Luna-Rivera



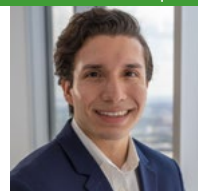
Estefania Marquez



Jazmin Albarran



Kembely Caro Fernandez



Milton Hernandez

RSM US Foundation scholarships (campus based)

The RSM University Scholarship program provides grants to targeted colleges and universities across the United States and Canada. The schools award the scholarships to deserving business and technology students. In 2021, we awarded \$311,000 in scholarships across 52 schools.



In 2021,
we awarded

\$311,000
in scholarships across
52 schools

“I would like to take the time to thank you for providing the financial support I need to successfully pursue my undergraduate degree in accountancy at Baruch College. The journey of achieving this milestone in life is not easy and having the honor to accept such an amazing scholarship is something I truly appreciate and something I am proud of.”

– Abby Lam, undergrad at Baruch College

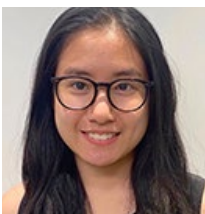
“I am extremely grateful to receive this scholarship because I believe it truly helps me achieve my goals. I want to be able to graduate from DePaul with an accounting degree, and I also want to get my master's degree, and then take the CPA exam. I understand that a select few receive this award, and I am just thankful.”

– Joseph Chirayil, undergrad at DePaul University

Power Your Education



The RSM US Foundation gives back to our profession through our Power Your Education scholarships, awarding 10 U.S. students every year with \$10,000 each to put toward their business- or technology-related undergraduate degrees. The 2021 winners were selected based on a number of core criteria, including GPA, a short statement describing something that makes them unique and a 30-second video response to the question: “What does RSM's brand promise—the Power of Being Understood—mean to you?” Judges assessed the applications based on creativity, quality of writing, a reflection of the applicant's individuality, and the degree to which each video submission reflected RSM's core values of respect, integrity, teamwork, excellence and stewardship. Meet our 2021 Power Your Education winners:



Shirley Chan

Finance and investments, Baruch College

“This scholarship empowers and motivates me to continue my pursuit of a career in the finance industry.”



Alicia Cornelius

Accounting, Oklahoma State University

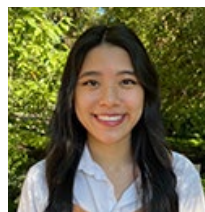
“I can't fully express how grateful I am to be selected as a recipient for this scholarship. This scholarship has already relieved so much financial stress and will allow me to focus more of my time on my schoolwork and enjoying my last year of undergrad!”



Giselle Garcia

Hospitality and hotel management, Drexel University

“This is more than an award; it is an opportunity. Not only will it allow me to continue excelling academically at Drexel University, but it is also an opportunity to pay it forward by continuing my self-improvement and one day reciprocate this kindness to my community.”



Cayla Kwee

Accounting, University of Texas at Dallas

“This scholarship financially supports my dream to earn a master's degree in accounting and become a CPA. I am so grateful and honored that RSM has chosen to invest in my education, and I will continue working hard to be a leader and light in my community.”



Jennifer Martin

Accounting, Pennsylvania State University

"It is an honor to be one of the ten nationwide Power Your Education Scholarship winners. Bringing joy and new insights to others through my work is truly rewarding and humbling."



Desli Norcross

Luxury brand marketing and management, Susquehanna University

"It is an honor to receive this scholarship and I am truly grateful for having this opportunity to apply. I believe that an education opens doors and I would like to give a heartfelt thank you to RSM for supporting me in achieving my goals."



Gabrielle Prill

Actuarial science, Finance Management at Organizational Leadership, Drake University

"This scholarship shows me that the extra mile makes all the difference. In a time of such uncertainty, being a college student has been challenging. This scholarship will help me continue to seek out ways to grow personally, professionally and academically."



Irene Santangelo

Business administration: Management of Information Systems and Finance, Northeastern University

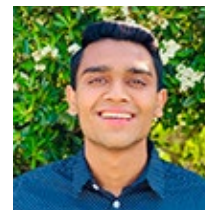
"Receiving this scholarship from the RSM US Foundation is such an honor. I was happy to just have learned a new skill, animation, in creating my video submission. But, actually winning shows that my hard work paid off and that I should continue to explore my creative interests."



Jacob Thibault

Finance, University of St. Thomas, Minnesota

"The Power Your Education Scholarship means that I know I can continue to develop and grow as a human, student and friend with the support of an extraordinary company. In these tough times, RSM has helped not only me, but other students, have hope for the future."



Pavaan Valand

Business administration—accounting and finance, California State University, Fullerton

"I am extremely excited to receive the Power Your Education Scholarship. As my family and friends motivate me to accomplish my educational goals, this scholarship will empower me to focus on school and not worry about the financial stress of paying for school."



First Generation Scholarship



In 2021, the RSM US Foundation officially launched the First Generation Scholarship program to help first-generation business and technology college students succeed in the business world with additional financial support. RSM partner Sergio de la Fe, a first-generation college graduate himself, raised more than \$400,000 to create this scholarship and the RSM US Foundation matched his efforts. To apply, students are asked to craft brief essays explaining what motivates them to be a first-generation graduate; in addition, they must submit a short video that demonstrates what The Power of Being You means to them.

This scholarship awards five students with \$10,000 annually for up to three consecutive academic years. Each student receives a total of up to \$30,000 to help them pursue their undergraduate degrees and realize their dreams.

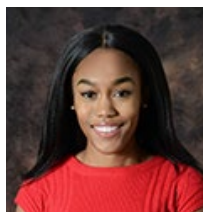
The first class of First Generation Scholarship recipients was [announced in May 2021](#) and included the following recipients:



Jessebell Guerrero

Business administration Management,
University of Florida

"The First Generation Scholarship will allow me to focus my energy and efforts primarily on my academics rather than my finances. Beyond this, it's proof that beyond my peers, friends and family, established professionals believe in me as well."



Nyah McDonald

Finance, Michigan State University

"When I first got the news, my cheeks were soaked with tears. There's nothing I want more in this world than to reach my goals and get my family out of poverty. Appreciation is an understatement of how I feel for the First Generation Scholarship."



Jasmine Ortiz

Business at Texas Tech University

"Because of RSM, I can continue school, not worrying about how I am going to afford it. I no longer have to worry about my parents pulling out their pockets to help me; now I can help them. I am blessed to be a part of this amazing organization."



Jessica Rivera

Accounting and business management,
University of Maryland

"As a first-generation student, this scholarship means there is a community who understands, supports and believes in me. Many times, I have faced moments of doubt throughout my college experience. This scholarship helps me not only financially, but also inspires and reminds me to keep reaching for my goals."

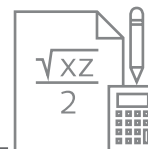


Annette Sebastian

Computer science and operations and
information management, University of
Massachusetts, Amherst

"As a first-generation student, I'm so excited and thankful to receive this scholarship which will help me achieve my goals of inspiring others to pursue the unthinkable! This gives me the confidence to enter the workforce where I can share my unique experiences as an Indian American."

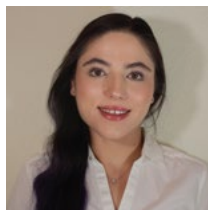
RSM Community College Accounting Scholarship



In 2021, the foundation piloted the RSM Community College Accounting Scholarship program to help five students from Southwestern College, a community college in Chula Vista, California, matriculate to a four-year college to pursue a bachelor's degree in accounting. The pilot program awarded each student up to \$11,500 each to be paid out over three consecutive academic years. RSM partner Sam Mascareno, a community college grad himself, approached the foundation with the idea to pilot this program to help ensure that the future generation of business leaders have the opportunity to achieve their goals. [Learn more](#) about each of our deserving winners and hear their stories!



Kathleen Estrella
San Diego State University



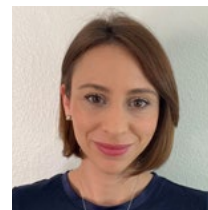
Lili Johnson
Southwestern College



Jennyfer Laurent
San Diego State University



Andy Lozano
University of California, Santa Barbara



Priscilla Partida
San Diego State University

Zach Johnson Foundation

The inaugural winners of the RSM Shot at College program were announced in partnership with the Zach Johnson Foundation and Kids on Course program in 2021.

Members of the inaugural Kids on Course class are rising high school seniors who met certain criteria tied to their academic growth and demonstrated a strong record of stewardship within their schools and communities. Interested students applied for an RSM Shot at College scholarship by writing essays about pursuing their academic passions and how this scholarship will support their journeys.

This program awarded three students with a four-year college scholarship valued at \$40,000 (\$10,000 annually) to support them in continuing their education and following their dreams. Students pursuing degrees aligned with RSM's business needs who have a strong academic performance will also participate in the RSM Pathways Summer Leadership and internship programs.

The 2021 Shot at College scholarship recipients include the following:



Pacience Dixon:

"This scholarship has allowed me to look forward to college as a building block to my future, rather than a pile of debt I could only hope to pay off one day. This means I can spend the next four years focused on my academics rather than pinching pennies."

Ella Heder:

"It feels amazing to know that I've been able to receive such a scholarship. With having this opportunity, my dreams no longer feel like something I only access when I'm asleep, but rather something that I will genuinely live within in the future."

Johanna Maldonado:

"This scholarship has helped me be more confident in my future. If it weren't for this scholarship, college wouldn't be a possibility for me because of the financial burden it would place on me and my family."





Other Support



Racial Equity

The RSM US Foundation supports racial understanding through its support of RSM's Season of Service.

This year, RSM launched its third annual Season of Service, which honors Dr. Martin Luther King Jr.'s legacy of service by encouraging everyone across the firm to serve others and give back to their communities by sharing their time, talent and resources throughout the winter holiday season. There are countless opportunities for volunteers to participate in Season of Service projects, many of which qualify for the RSM US Foundation's Dollars for Doers program, a program that enhances individuals' and volunteers' gifts of time by awarding grant dollars to foundation-aligned organizations.

During this year's Season of Service, local offices across the firm hosted events in their communities, including the highly anticipated #HashtagLunchbag effort to empower and inspire humanity by packing lunches for those in need. Through this program our volunteers safely packed and delivered 11,012 meals to the homeless. RSM volunteers also donated to the Racial Understanding Campaign, a foundation program that will match up to \$200,000 in donations to be split among 10 charities in the United States and Canada that are focused on providing youth with equitable access to resources and opportunities. The charities include the following:

- 100 Black Men of America
- Ascend Leadership Foundation
- Avance
- Black Youth Helpline (Canada)
- Boys & Girls Club of America
- Braven
- BUILD Inc.
- Committee for Hispanic Children and Families
- Mainspring School
- National Black Child Development Institute

“Your gift has a direct and lasting impact on the next generation of leaders—whether it's ensuring that more college students have access to our innovative career accelerator course, providing an additional professional mentor or career trek to our post-accelerator fellows, or helping students access the jobs and internships necessary to land on a path to upward economic mobility.”

– Aimée Eubanks Davis, Founder and Chief Executive Officer, Braven

Season of Service

is a campaign near and dear to many at RSM, here is what we saw in 2021:



448
volunteers



1,017
service hours

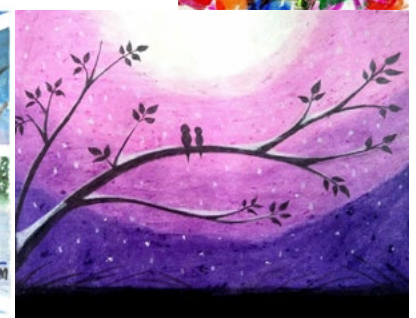


\$73,130
Donations generated

Holiday Card Contest



The year 2021 marked our sixth annual [RSM Holiday Card Contest](#). More than 140 young family members of RSM employees and owners submitted their original artwork for a chance to be featured on one of our firm's five holiday cards. The winning artists each received 25 professionally printed cards featuring their design and each selected a charitable organization aligned with the RSM US Foundation's mission to receive a \$1,000 grant.



A Look Ahead

- In early 2022, the RSM US Foundation will launch the Community Impact Fund. The program will allow RSM employees and owners to apply for grants that align with the RSM US Foundation's mission. The Community Impact Fund will amplify team fundraising efforts, matching up to \$10,000, and amplify our people's relationships with local charitable organizations through a one-time monetary grant.
- In March 2022, the RSM Community College Accounting Scholarship is expanding nationally and will relaunch as the RSM Power Your Transition—Community College Scholarship program. In 2021, the scholarship program supported five students from Southwestern College in California; it will now provide scholarships to 10 winners across the United States.
- Volunteer Week will again return to its original title, Volunteer Day. Our employees will now be able to hold volunteer events anytime throughout the Power of Love season (Aug. 1–Sept. 30) to qualify for Birdies For Love participation and incentivized Dollars for Doers grants.

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