



ksm

Our Most Important Investment Is You



## It's an Exciting Time To Be a KSMer

Technology and AI are redefining how we work. Our firm is growing. And our people continue to look for new ways to meaningfully shape their careers—and their lives.

I believe that the quality of our work is only as strong as the engagement—and fulfillment—of our people. So we're going to continue listening to you and supporting you, doing even more to give you the flexibility and space you need to grow, while helping you build strong relationships that help you accomplish your goals.

Whether it's our investments in technology, renewed commitment to mentorship, innovative approaches to learning and development, enhanced personalized hours plans (PHPs), supportive employee resource groups, a brand-new HQ (coming summer of 2026), or any of the other benefits KSM provides, we're dedicated to making sure your experience at KSM is as rewarding as possible. And we're not done—our commitment to you is to provide the environment, resources, and opportunities to inspire you and propel you forward.

I'm excited about what we've accomplished this past year and for what's on the horizon for KSM. I can't wait to see what we'll continue to achieve together.

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**Tim Cook**  
KSM CEO & President

A handwritten signature in black ink, appearing to read "Tim Cook". The signature is fluid and cursive, with a large "T" and a stylized "C".



Our employee-first philosophy means working together to support and build strong relationships, staying curious to encourage innovation, and nurturing your ambition so you can accomplish more great things.

# Empowerment in Action



## Take Control of Your Own Destiny

We understand that the journey to success looks different for everyone. That's why at KSM, we offer you the flexibility to choose how you want to work, learn, and grow.

Over the years, we've introduced initiatives such as remote and hybrid work options, community involvement opportunities, flexible workspaces, and various leave benefits. We're continuously enhancing these offerings, giving you the freedom to manage your time and approach your work in a way that makes sense to you.

## Shape Your Schedule With Personalized Hours Plans (PHPs)

Our PHPs are designed to give you the flexibility to allocate your work hours in a way that aligns with the needs of our firm, our clients, and your lifestyle. These plans help you be more intentional with your time, allowing you to balance your personal passions with your career goals.

In 2024, we've focused on enhancing the PHPs to offer you more choice and transparency in how you spend your discretionary time at work. While these plans have typically centered around hours, our refreshed approach encourages you to think beyond the numbers – focusing on how your contributions support your own growth and KSM's culture.



## Introducing the PHP Discretionary Hours Activity Guide

Published in 2024 for use in 2025, our new PHP discretionary hours activity guide is built around five key categories to help you shape your year and make the most of your non-chargeable time by focusing on areas where you're passionate and thrive.

The five PHP discretionary categories include:

- Community Involvement
- Technology and Innovation
- Business Development
- People and Culture
- Learning and Development

With resources tailored to each category, the guide helps you explore meaningful projects and activities that align with your personal goals and interests.



Matt Svenstrup of KSM's Transaction Advisory Services Group takes some well-deserved time off with his family.



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*The personalized hours plan has been essential for balancing my work with my health and wellbeing. With PHP, I can incorporate fitness classes, home-cooked meals, and daily walks into my schedule – all while staying focused on my clients. This flexibility keeps me mentally and physically strong, allowing me to bring my best self to my clients and team every day.*

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**Juliana Caronia**

Manager, Business Advisory Group

## Get Ready To Unplug

The week of July Fourth is a perfect time to gather with family and friends, enjoy good food, and soak up some sunshine. To embrace this spirit, KSM is introducing a firmwide Unplug Week during this time each year. Beginning in 2025, our firm will be closed for the entirety of Unplug Week, giving you a chance to fully disconnect, recharge, and return refreshed.

# Your Path. Your Journey.

## 70-20-10 Model

Our learning and development focuses on the 70-20-10 model, which means:

**70%** of development comes from on-the-job experiences

**20%** of development comes from coaching and feedback

**10%** of development comes from formal training

## Learning and Development By the Numbers

**1,212** courses completed on LinkedIn Learning

**1,924** CPE credits earned on LumiQ

### Top LinkedIn Courses Watched

**01** How To Research and Write Using Generative AI Tools

**02** Confronting Bias: Thriving Across Our Differences

**03** Communication Foundations

**04** Developing a Critical Thinking Mindset

**05** Excel for Accounting

## Create the Impact You Want To Make

No two KSMers need the exact same type of learning and development. Experience level, position, key interests, and personal preferences all play a role in what – and how – you should be growing and improving.

At KSM, we're expanding the perspective of what learning and development is all about. And we're doing it in a highly personalized way that includes a variety of self-guided resources. We also understand that learning and development goes far beyond technical skills. So while those remain a focus, we're also prioritizing soft skills and leadership development to help you become even more well-rounded. We're working to seamlessly integrate these opportunities into your everyday work, making development a natural part of your journey here at KSM.

## More Ways To Learn and Grow

We're committed to providing the best learning and development opportunities available. Here are three key areas we've focused on this year:

### Level Training

In the past, tax and audit employees participated in separate training sessions. Now, we're bringing these groups together to foster a more collaborative culture. By learning side-by-side, we gain a better understanding of each other's roles and responsibilities – ultimately leading to better outcomes for our clients.

### eLearning

We continue to make eLearning a priority – and for 2024, we've moved much of our onboarding content online, ensuring a more scalable, equitable experience for all new hires. We've also curated new courses and resources focused on professional skills, which are highlighted each month on KSMgo!, to ensure they are easily accessible to all employees.

### Leadership Development

Developing our leaders – and cultivating future ones – remains a top priority. By gathering feedback and identifying the skills needed for success, we've introduced several new initiatives – including adding The Leadership Challenge® to our IMPACT program for new managers, a research-based development program designed to teach the behaviors that are proven to increase leadership results.



## A Renewed Commitment to Mentorship

We're committed to providing you opportunities to build meaningful connections that help support and guide your career. Many KSMers have expressed the desire for a more robust mentorship program, and we've taken action.

Our refreshed mentorship program adds structure and guidance, while still offering the flexibility to make the relationship your own. These guidelines are here to help you get the most out of your mentor-mentee experience without feeling bound by a rigid framework.

Here are a few highlights of the program:

- Existing mentor-mentee relationships will be honored, and we're also happy to match you with someone new.
- A thoughtful Q&A screening process helps ensure you're matched with the right mentor.
- Mentorships can be tailored to focus on the topics that matter most to you.
- Conversation guides are available to help facilitate productive and meaningful conversations.
- So far, nearly 200 participants have joined the program.
- We'd love for you to get involved!



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*As a participant in the IMPACT leadership development program, I truly valued the detailed feedback and insights from my team on how I could improve as a new manager. What made the experience even better was having a fantastic instructor and supportive fellow participants who helped me turn that feedback into practical, actionable steps for growth.*

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**Spencer Leazier**

Manager, Business Advisory Group



# Your Path. Your Journey.

## More Growth. More Opportunities.

We always approach acquisitions with thoughtfulness and intention, ensuring each new firm is both a strategic and cultural fit. In 2024, we welcomed three organizations that have expanded our capabilities and created exciting opportunities for our people.



### Cassady Schiller

*Cassady Schiller, a well-respected CPA and advisory firm, joined KSM in May to become our Cincinnati office (and our first location in Ohio). This addition brings more than 70 skilled professionals who share KSM's commitment to people, client service, and community – opening pathways for growth and collaboration for all KSMers.*



### Shanholt Glassman Klein Kramer & Co. (SGKK)

*SGKK, a New York-based CPA and advisory firm, joined KSM in October and brings deep sector knowledge and expertise, with over 80% of its clients in the real estate industry. The addition of 60 professionals to our New York office increases our team to nearly 90 employees, strengthening our ability to attract top talent. This expansion elevates our presence in the competitive New York market and opens new career opportunities for our people.*



### ValueKnowledge LLC

*ValueKnowledge LLC, a nationally recognized leader in valuation services, brings a diverse client base that includes publicly traded companies, private equity-owned businesses, and large middle-market firms. ValueKnowledge joined KSM in October and expands our valuation capabilities, particularly in conducting fair value valuations for financial reporting – an area of increasing demand within our firm.*





## Not a Tech Adopter. A Tech Leader.

Our firm made significant investments in technology in 2024 because we know that staying at the forefront of innovation is essential – especially in our industry. We believe emerging technologies can help make your career more efficient, balanced, and rewarding, while opening up countless new ways for learning and growth.

We're investing in people, too. This includes a new director of IT operations to focus on system availability, scalability, and security across our work environments, and a director of digital transformation to identify next-gen technology and boost firmwide AI literacy.

On the software side, we're focusing on applications that not only increase efficiency, but also free up time for more valuable, impactful work that benefits our clients. Here are some key software technology investments from 2024:

### ChatGPT Enterprise

As our most significant new software investment, ChatGPT Enterprise is transforming how we work. This general-purpose technology impacts all areas of our business, making us more agile and effective in the services we provide. We're rolling it out in phases and providing training to help you harness its full potential, no matter your role.

### HubSync

Designed to automate and streamline tax services, HubSync improves client engagement and enhances workflow efficiencies. It offers tools for client collaboration, document management, and data gathering as well as a centralized portal for all tax-related interactions. HubSync also integrates generative AI into several functions, helping us work faster and smarter.

### Inflo

Our new digital audit platform, Inflo, uses analytics, automation, collaborative tools, AI, and real-time reporting to improve our approach to audit work. It is designed to help our audit teams focus on higher-value activities by automating repetitive tasks and providing deeper insights into financial data.

### VMware Horizon

As remote work continues to be a key part of our culture, we've invested in VMware Horizon to ensure you can reliably and securely access virtual desktops and applications. Whether you're at home, in the office, or on the go, you'll have access to the resources you need to stay productive and connected.



*Implementing AI through ChatGPT Enterprise provides our team with new opportunities to stand out, add value, and grow in our careers by streamlining processes and modernizing manual tasks. The potential for innovation at KSM is exciting, as it empowers us to optimize our work and focus more on client service and professional development.*

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**Ben Irwin**

Director, Audit & Assurance Services Group

# A Culture of Connection



## Building Meaningful Relationships Based on Mutual Support

At KSM, it's the strength of our relationships that sets us apart. You are the heart of what makes KSM successful, and that success is built on a foundation of mutual support and genuine care. We're proud of the culture we've created – a culture where you can be your authentic self, grow, and thrive.



*Being part of the Working Parents ERG has given me valuable advice and resources, helping me feel more confident in my parenting decisions. It's also allowed me to connect with other parents at KSM, building relationships with colleagues I might not have met otherwise.*

**Stephanie McConnell**

Senior Audit Support Coordinator, Audit & Assurance Services Group







## Find Your People With Employee Resource Groups (ERGs)

All KSMers have common interests beyond work, and our ERGs are a great way to bring those interests to life. ERGs offer a supportive environment where KSMers can come together, fostering a sense of belonging and connection.

While we've had ERGs in previous years, we've formalized the program this year and added three new groups. Each ERG is focused on a specific goal and vision.

Our current ERGs include:



### Women

Focused on creating an environment of support, mentorship, and advocacy for women at KSM, helping to enhance their overall wellbeing.



### Working Parents

A space for parents to connect, share experiences, and access resources to navigate the balance between work and family life.



### Mental Wellbeing

Offering opportunities throughout the year to participate in activities that promote mental wellbeing including networking events, busy season challenges, and guest speakers.



### SURGE

A group dedicated to KSMers early in their careers, providing opportunities for networking, personal development, and professional growth.



### Remote

Ensures remote employees stay connected to KSM leadership and their respective workgroups by offering resources and best practices for career development.

If you have an idea for a new ERG, we'd love to hear from you.  
We're always looking to add new groups!



# A Culture of Connection

## More Ways To Support Your Wellbeing

At KSM, your health and happiness are always top priorities. That's why we have resources available to all KSMers, designed to support you in different aspects of life.







### Care.com

All KSM employees have access to a premium membership with Care.com, the world's leading network for finding and booking care solutions for children, seniors, pets, and more. Whether you need a nanny, babysitter, pet sitter, senior caregiver, housekeeper, or tutor, it can all be found on Care.com's network.

### BrightPlan

BrightPlan, a financial wellness-focused digital platform, is available at no cost to all KSMers. It offers a wide array of resources to help you plan for the future and stay on track with your financial goals. This includes financial education webinars, investing and tracking tools, and access to a fiduciary advisor.

### SupportLinc

Your mental health matters to us, which is why we provide SupportLinc, a confidential digital platform providing mental wellness and work/life balance resources for any interested KSMers. SupportLinc includes real-time support from licensed clinicians, counseling services, text-based coaching, health navigators, and a variety of tools designed to help you stay at your best.



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*As someone focused on ensuring my retirement planning is on track, I've really appreciated the webinars BrightPlan offers, especially on topics like Roth conversions, tax implications, and Medicare enrollment. It's been a great resource for staying informed and feeling more prepared for the future.*

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### Barry Armstrong

Director, Noble Consulting (KSM's insurance regulatory consulting practice)

# A Culture of Connection



## It's a Whole New HQ

We're thrilled to share we've signed the lease for our new Indianapolis headquarters, located at [Six Parkwood, 600 E. 96th St.](#), in the Parkwood Crossing office park. While we are staying close to our current location, this move – planned for the summer of 2026 – marks an important step forward for our firm.

Our new headquarters will be purposefully designed with the future in mind. We're creating a modern, flexible, and inclusive space that reflects the needs of KSMers for collaboration, learning, mentoring, accessibility, and relationship-building. Whether working in the office, in a hybrid setup, or visiting from another location, the new HQ will offer a variety of work-spaces and state-of-the-art amenities to help you do your best work.

This move positions us for continued growth while staying true to our commitment to our team, our ESOP, and our independence. We'll be sharing more exciting updates as the design process unfolds, and we can't wait to see how this new space will serve all of us.





