



FORVIS[®]

2023 | **INTEGRATED REPORT**

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TABLE OF CONTENTS





4	The FORVIS Way in Action: Be Bold
6	The Story of FORVIS: How We Came to Be
8	The FORVIS Way: Our DNA
10	Be Your Best Self
14	Excel Always
19	Be Builders
26	Operate as ONE FORVIS
29	Lead With Integrity
31	Deliver Unmatched Client Experience
35	Closing

THE FORVIS WAY IN ACTION: BE BOLD

What an incredible, historic first year as **FORVIS**.

It is hard to believe a year has passed since our firm was created through one of our profession's largest and boldest mergers in recent memory. Perhaps the only thing harder to imagine is all that we have achieved—together, as one firm—in just one year. The accomplishments are many, as you will see in our 2023 Integrated Report.

The report is much more than a measure of our output. It is also intended to help you understand the culture, controls, and environment we are building at FORVIS that allow us to deliver an **Unmatched Client Experience**[®] time after time.

The strong culture of our firm is the foundation for all we do, and this Integrated Report is organized as a reflection of that culture, or as we call it, The FORVIS Way. When we first began to dream about the possibilities and opportunities that would be unleashed by creating a new national firm, the conversations were centered on culture. This intentional focus on who we are and how

we act has continued to carry us through significant growth and change. It has allowed us to fulfill our mission and live out our purpose: "To help those we serve unlock their full potential."

As you read this year's Integrated Report, you'll see the many ways FORVIS and our people have remained committed to this purpose, from providing world-class levels of client satisfaction and being thought leaders in the industries we serve, to giving back to our communities and creating an environment where our people can build remarkable careers, and so much more. We understand these components must work together in a symphonic way to create a winning atmosphere for both our clients and our people.

We're incredibly grateful for and proud of what is happening at FORVIS. We're excited to share with you the many remarkable aspects of our firm in this Integrated Report, and we're even more excited that we're just getting started.

BE BOLD



TOM WATSON

Tom

CEO



MATT SNOW

Matt

Governing Board Chairman

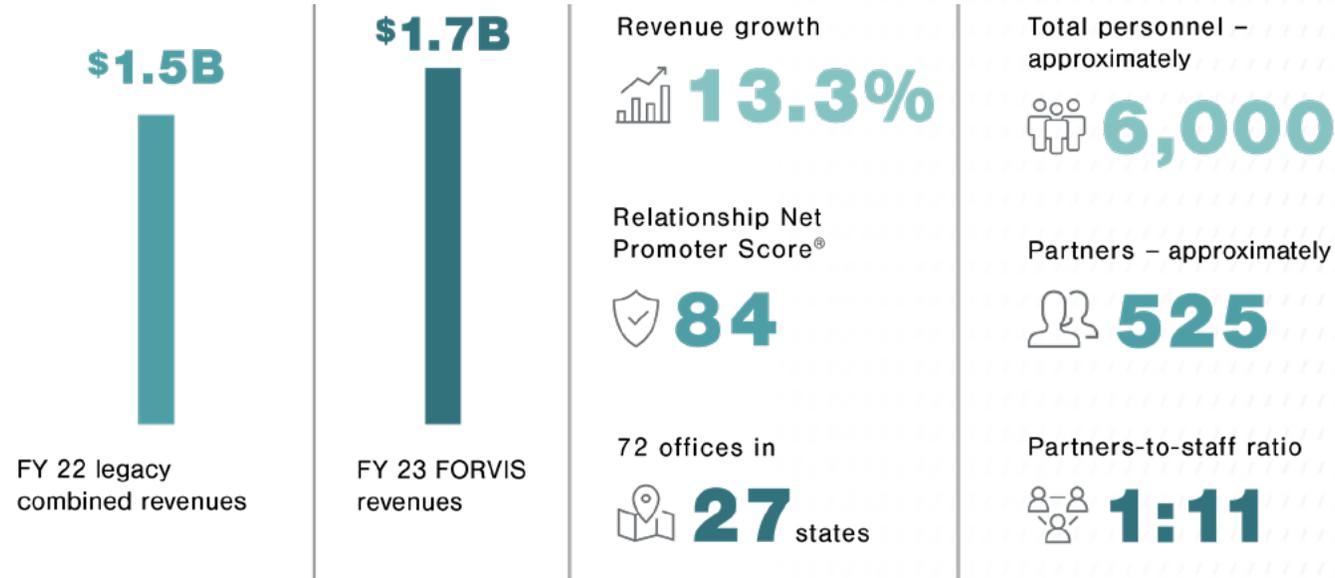
THE STORY OF FORVIS: HOW WE CAME TO BE

We are proud to present this 2023 Integrated Report—our first as FORVIS. The stage is set for a bright future for our firm, our people, and the work we do each day for our clients. Yet this is not the first chapter of our story. FORVIS is built on the strong legacies of BKD and DHG and a foundation of excellence dating back more than 100 years.

The idea was born from professional relationships built on respect, trust, and mutual admiration. Leaders at BKD and DHG both worked to foster mutual respect, aligned strategies, and strong cultures within their respective firms. Both organizations prided themselves on putting their people first. Each placed a high value on their relationships with clients, as evidenced by a Net Promoter Score® consistently far above the accounting industry average and in league with some of the world’s top brands. These two values reinforced one another, as both firms excelled by cultivating and mentoring teams of professionals with deep knowledge of the industries they served.

As the relationship deepened, it became clear that while the two firms were not exactly alike, they were very like-minded. Talk of strategies began to reveal the powerful possibilities that could be created with a common path forward. With alignment on culture as our North Star and serving clients as a truly national firm as the goal, a merger of equals was announced in February 2022.

In April 2022, we revealed our new name: FORVIS, forged from “forward” and “vision.” We took on this bold new name because it represents who we truly are—a different kind of professional services firm dedicated to understanding what comes next and delivering an Unmatched Client Experience. FORVIS is built upon the strong legacies of BKD and DHG, which are reflected in our name¹ and represents our unique focus on preparing our clients for what is next.

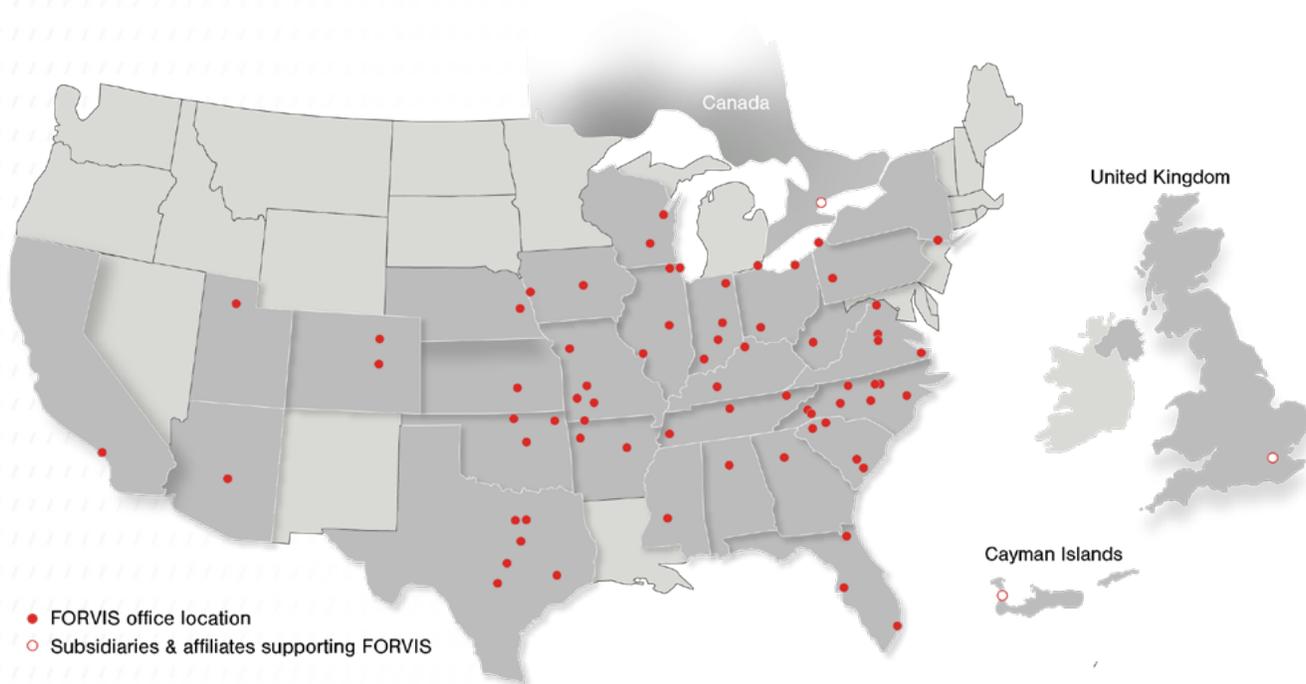


¹FORVIS is built upon the strong legacies of BKD and DHG, which are reflected in a name that comprises partner initials and represents our unique focus on preparing our clients for what is next.



Today, FORVIS² ranks among the top 10 public accounting firms in the United States, with more than 6,000 team members serving clients across the globe through more than 70 offices in 27 states, the United Kingdom, Canada, and the Cayman Islands.³ We continue focusing on further geographic expansion, finding innovative ways to serve clients' needs, and providing a best-in-class employee experience.

We are now writing a new chapter to launch our next 100 years, but some things remain the same. Our story is still one of relationships, as evidenced by our cultural DNA. Our culture defines and guides us, helping us consistently deliver high-quality results for one another and our clients.



²FORVIS, LLP is a professional services firm providing assurance, tax, and consulting services. Created by the merger of equals of BKD, LLP and Dixon Hughes Goodman LLP (DHG), FORVIS is driven by the commitment to use our forward vision to deliver an Unmatched Client Experience[®].

³Services outside the United States are provided through our subsidiaries and/or affiliates supporting FORVIS.

THE FORVIS WAY: OUR DNA

One of the first things we did as we integrated to become FORVIS was to prioritize defining our culture—both what we have today and where we aspire to be in the future. We gathered team members from across the firm to help codify our cultural framework. This group worked swiftly with deliberate purpose to define the key attributes that make us uniquely FORVIS.

We have coined our cultural framework as our DNA. It includes our purpose, mission, vision, and values, referred to as The FORVIS Way. As a team, we are passionate about making our DNA more than words. Our DNA defines our legacy, articulates how we show up daily, and outlines behaviors that make us unmistakably FORVIS.

At FORVIS, we have a shared purpose of helping those we serve unlock their full potential. In addition, we all have our individual purpose of striving to be our best selves so that we can unlock our own potential and deliver on the promise of FORVIS' mission and vision.

That sense of purpose inspires us and calls us to action. It gets us up each morning—committed to making a difference. It's why we do what we do. No matter what occurs in a day, when our why is at the center of our actions, we will have a better, more meaningful day, thus creating positive outcomes for each other and our clients.

A crucial part of The FORVIS Way is delivering an Unmatched Client Experience, which defines how we work with our clients and team members to provide a truly unique experience. Our commitment to serve is the foundation upon which we build a great culture from the inside out.

You'll note that the chapters in this report are organized by various components that make up The FORVIS Way. Each chapter represents how we live our DNA, serving our clients and each other in bold ways. We are proud to hold ourselves accountable to these standards, and excited to demonstrate The FORVIS Way in action to those we serve.



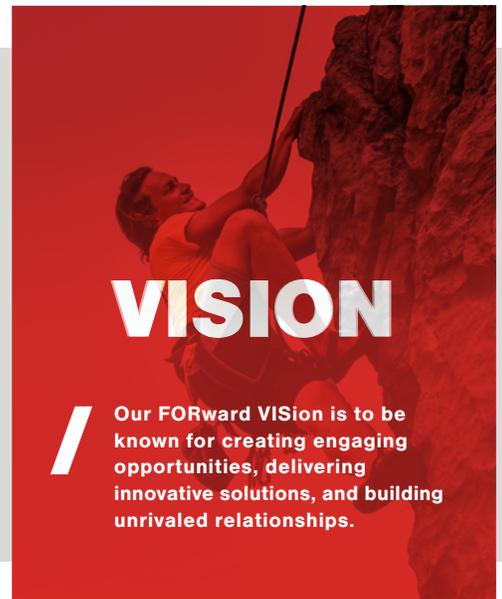
PURPOSE

Our purpose is to help those we serve unlock their full potential.



MISSION

Our mission is to build remarkable careers and provide an Unmatched Client Experience through an uncommon commitment to excellence.



VISION

Our FORward VISION is to be known for creating engaging opportunities, delivering innovative solutions, and building unrivaled relationships.

BE BOLD

Be your best self

- Set high expectations for ourselves
- Create an environment where everybody can succeed
- Have empathy and respect the differences that make us great

Excel always

- Bring forward-looking solutions with discipline and accountability
- Under promise, over deliver, and go beyond what's expected
- Follow standards of excellence for our firm and profession

Be builders

- Invest in the growth and development of others
- See possibilities and deliver innovative solutions
- Look for opportunities to build expertise, be lifelong learners, and build relationships

Operate as **ONE FORVIS**

- Bring the best of our firm forward in an intentional way
- Leverage and trust the full capabilities of FORVIS
- Set our firm up for success, have each other's backs, and win as a team

Lead with integrity

- Ensure integrity trumps economics every time
- Make wise business decisions that set the standard for our profession
- Enable radically candid feedback (put the moose on the table)

Deliver an **Unmatched Client Experience**

- Listen to understand
- Be responsive
- Consult with purpose to deliver value

BE YOUR BEST SELF

At FORVIS, we set high expectations for ourselves and create an environment where everyone can succeed. We do so through holistic learning opportunities, robust benefits, and a strategic focus on inclusion and diversity. As we came together, we developed many offerings that truly support our people, helping them unlock their own potential—and, in turn, that of our clients and our communities.

Recognizing Our People Through the Key Award & BRAVO!

Everyone at FORVIS is held to the same standard of providing an Unmatched Client Experience through an uncommon commitment to excellence. Whether serving clients or supporting the firm’s administrative functions, we strive to meet the needs of those we serve each day. Since accomplishments and jobs well done are most often recognized by co-workers, FORVIS created programs that allow team members to celebrate each other.



FORVIS created the BRAVO! recognition program as a way to celebrate in real time those who have exemplified our values. This recognition of excellence, with peer visibility, provides tangible examples of what The FORVIS Way in action looks like and helps boost team member engagement and drive client service to new heights while further demonstrating our commitment to building remarkable careers.



The Key Award was created in 2023 to honor those who have uniquely modeled our mission and core values. The name for this award is connected to our purpose of helping those we serve unlock their full potential. The award is presented annually to one partner or managing director and one team member based on nominations from their peers. Every individual at the firm is eligible to be nominated and receive this award, regardless of their role.

2023 Key Award Winners



Ling Zhang – Partner

Ling Zhang is the Metro D.C. market industry leader in Technology and Services, based in Tysons, Virginia. She was admitted as a partner on June 1, 2023, having previously been a managing director, and has been with the firm for four years.

In nominating her for the Key Award, Ling’s colleagues noted her genuine leadership style, generous mentorship with younger team members, and exceptional business development mindset. “She is a builder—a people builder and a business builder,” said one.



Casey Potts – Senior Managing Consultant

Casey Potts is a senior managing consultant with our deal advisory practice, based in Atlanta. She started as an intern with the firm in 2013 and worked in Kansas City before relocating to Atlanta.

In nominating her for the Key Award, Casey’s colleagues cited her highly professional approach to working with clients during sometimes delicate M&A engagements, as well as the time she takes to teach and mentor team members regardless of her existing workload. “She’s a great role model for others to look up to and is exactly what FORVIS looks for in a leader,” said one.

Total Rewards

At FORVIS, creating a best-in-class employee experience is at the heart of our forward vision, and this begins with investing in our most valuable asset – our people. The firm makes a significant investment in a total rewards package that offers a variety of benefits and perks to our team members, including leadership development opportunities and best-in-class training, as well as robust health coverage, lifestyle benefits, a retirement plan, and life insurance. In return, these offerings attract high-potential talent to our firm so that we can deliver on our commitment to an Unmatched Client Experience.

We have more than 6,000 team members and leaders, each with unique needs. With this in mind, we intentionally designed our benefit packages so we can meet team members where they are. Some of the key highlights include:

- Lifestyle Spending Accounts
- Flexible Time Off
- Bonding Leave
- Profit Sharing Contribution

Inclusion & Diversity

Creating an inclusive experience is essential to being our best selves at work. At FORVIS, we strive to create an environment where everyone can succeed. Our people experience a sense of belonging that is safe, welcoming, and respectful of all individuals through genuine connections. Simply put, we respect the differences that make us great. This focus on respect for each other helps make us uniquely FORVIS and allows us to build unrivaled relationships with our clients, colleagues, and communities.

Inclusion Networks

We recognize that our shared identities are a source of community, which is why we provide eight Inclusion Networks—voluntary, employee-led groups that enhance the employee experience and the communities they serve.

These networks are based on common identities, interests, and backgrounds and provide opportunities to network and build a more inclusive workplace. They promote learning, leadership, and community and help to create an environment where all individuals feel welcomed and valued.

Inclusion Network Highlights

We launched our Executive Inclusion Council building off the foundation of the strategic work of our legacy firms. Rachel Dwiggin and Fran Randall co-chair the council with executive leaders and future representation from leaders in each region serving as members.

Executive Inclusion Council

8 Inclusion Networks

35 Inclusion Network events

Inaugural Inclusion Summit for Network Leaders

Futures

In alignment with our purpose, our Futures program aims to help our next generation of leaders unlock their full potential. Futures is a multiyear leadership and development program for undergraduate students from historically underrepresented groups. Through Futures, we empower diverse students to take ownership of their careers by providing access to mentorship, intentional network, and pertinent professional development.

Inclusion Works

Inclusion Works is an innovative approach to learning how to incorporate inclusion and diversity, leadership development, and wellness into our daily decisions and behaviors. We partnered with HIVE Learning to encourage leaders and employees at FORVIS to be lifelong learners. This program is accessible to different offices or teams throughout the year to promote team building, connection, and communication.

African American Network

Asian Pacific Islander Network

Latin American Network

Veterans Network

Enabled Network

Parents Professional Network

PRIDE+

Women Forward

Organizations We Support

In addition to FORVIS' internal focus on inclusion and diversity, we also collaborate with national organizations such as NABA, ALPFA (Association of Latino Professionals for America), Ascend, Disability:IN, and Out & Equal. These organizations are dedicated to advocating for the communities they serve by providing resources and support to those in need and educating individuals on the importance of inclusion and belonging. Through our work with these organizations, we create a platform for those with diverse backgrounds to have their voices heard and their needs met.

Philanthropy

Vision. Integrity. Empathy. We believe these values set us up to be our best selves while calling directly on our purpose to unlock the full potential of those we serve. Through unrivaled relationships, we strive to make a positive difference in the lives of our people, clients, and communities. Alongside the opportunities to learn, grow, and excel is the commitment to create an environment where everyone can succeed. The FORVIS Foundation, the firm's charitable arm, aims to enrich the communities FORVIS serves through financial donations and volunteerism. During fiscal year 2023, the FORVIS Foundation donated \$2.2 million to organizations to make an impact for good.

A Culture of Empowerment

In spring 2023, we launched our community outreach platform. In the spirit of empowering our people to be their best selves through vision, integrity, and empathy, our platform is designed to help support the causes, beliefs, and organizations that are meaningful to our people personally. On this platform, our people can individually and as office or interest groups:

- Support a nonprofit of their choice through personal donations
- Easily track and manage volunteer activity
- Organize and invite colleagues to volunteer for events



2023 WE AAM TO SERVE MARKETING ACHIEVEMENT AWARD

United Way Hurricane Relief Donation in Naples, Florida

FORVIS demonstrated its commitment to giving back in a big way by giving \$500,000 to the United Way of Collier and the Keys to support ongoing recovery efforts for those affected by Hurricane Ian on Florida's southwest coast. The donation from FORVIS came about following a firm meeting held near Naples in fall 2022, just weeks after Ian devastated the area. Leaders from FORVIS participated in service projects with the United Way and felt compelled to do even more to help recovery efforts. That led to an impromptu charity auction during the meeting, followed by a nationwide campaign for additional contributions to support this initiative.

"Amazing gifts like this don't just happen—they are a direct reflection of the leadership and caring culture at FORVIS," said Steve Sanderson, president and CEO of United Way of Collier and the Keys, at the Center's grand opening event. "The firm saw a huge need and chose to serve in a big way and make a difference."



Impact in Action

We serve each other, our clients, and our communities, and we work with an aspiration to build strong, genuine, unrivaled relationships while making a lasting difference. Here are a few examples of how we serve our communities:



Northwest Region

The interns of the Decatur office created community engagement packages with items such as diapers and thermometers for Baby TALK. This educational, nonprofit organization aims to positively impact child development by nurturing healthy and responsive relationships during the critical early years.



Southwest Region

The Houston office volunteered with the Galveston Bay Foundation to remove over 400 deep-rooted sedge invasive plants from the Galveston Bay swells. These efforts eliminated the future growth of millions of invasive plants and improved filtration efforts of water flow into the Bay.



Northeast Region

The Evansville office celebrated United Way's 100th anniversary by sponsoring the United Way of Southern Indiana's 2022 Day of Giving. The team worked together to serve the Greater Evansville community by painting the playground at Newburgh Park and building doors and window headers for Habitat for Humanity.



Southeast Region

The Atlanta office volunteered by preparing meals at the Atlanta Community Food Bank where we have a long-standing history of volunteerism and support. Each year our Atlanta office raises funds to support the Atlanta Community Food Bank through its Georgia Accounting Food Fight campaign. This friendly competition among accounting firms is a way for our team to rally together to make an impact to help the one in eight Georgians who face food insecurity. Every dollar raised stays local and benefits the Atlanta Community Food Bank.



Mid-Atlantic Region

The Charlotte office supported Samaritan's Feet International's mission to serve and inspire hope in children by providing children with shoes. Audit and tax teams joined forces to help prepare and pack 1,825 pairs of shoes for distribution across the United States and worldwide.

The Metro D.C. team participated in the annual Dulles Day Plane Pull by the Metropolitan Washington Airports Authority Police Department. The team pulled an 82-ton FedEx Airbus A320 airplane 12 feet in 19.38 seconds to raise money for the VA Special Olympics.

EXCEL ALWAYS

To excel always is to go beyond what is expected and develop forward-looking solutions. With great discipline and accountability, our professionals continually seek to share knowledge in a variety of ways, including articles, alerts, webinars, and videos. Through knowledge sharing, ingenuity, and a keen eye toward excellence, we are consistently exceeding expectations and providing forward vision for the industries we serve.

FORsights™

FORsights—our thought leadership program—is our innovative series of articles, alerts, webinars, and videos designed to help organizations and individuals navigate the financial and economic landscape with industries and services insights of particular interest to the market. Valuable information and timely insights are shared on our website and delivered directly to the inboxes of our subscribers around the country and internationally. We also share FORsights on our social media accounts to keep our followers informed.

FORsights allows professionals at FORVIS to demonstrate their industry knowledge and specific service to clients and subscribers seeking sound, reliable guidance in this age of information overload and 24/7 breaking news. By offering a platform for our professionals to share their industry intelligence and understanding of critical issues and opportunities, team members are provided with an outlet to expand their influence and become “famous” in their areas of industry and technical focus.



In FY 23, forvis.com saw more than **1.46 million visitors** and remains a **top-ranking site** on Google for numerous keyword searches.

EDGE – The Innovation Lab of FORVIS

As part of our integration efforts, our legacy innovation programs combined into a new and improved innovation team, EDGE, the innovation lab of FORVIS. The goal of EDGE is to deliver an Unmatched Client Experience and develop valuable technology solutions for both external and internal clients to ultimately strengthen the culture of innovation at FORVIS. To that extent, EDGE brought 16+ products to market, providing innovative solutions for clients and generating new revenue for the firm.

The process for developing technology products focuses on five phases: Ideation, Research, Design, Execution, and Market Assessment. Within each phase, EDGE facilitates events and utilizes best-in-class tools to help ensure successful outcomes.

FORSIGHTS DISTRIBUTED IN FY 23



23.68 Million Emails



718 Articles



182 Webinars (External)



112 Events

Additional Accomplishments

- Began the new fiscal year with eight solutions in the development pipeline.
- Launched an innovation platform and a central door into innovation at FORVIS.
- Reviewed and rejected 50 projects. These rejections are viewed as accomplishments because organizations with great innovation cultures use all explorations, successful or not, as lessons to improve.
- Sunsetting 13 technology solutions that reached the end of their life cycles.

In FY 24, EDGE will focus on strengthening an ideation culture within the firm and continuing to deliver an Unmatched Client Experience to its team members so they can do the same for their external clients. One way we will achieve this is by hosting Innovation Tournaments. These multiday events bring together cross-functional groups to propose new, actionable ways of solving clients' most complex issues. This supports FORVIS in an effort to solve the "right problem" while leveraging our collaborative culture to find potential solutions. EDGE also researches and analyzes emerging technologies to determine how they can be leveraged and used to advance FORVIS' presence in the market. Finally, EDGE continues to develop and launch new technology solutions that will benefit clients, as well as new technology tools that support our client service teams as they deliver Unmatched Client Experiences.

Leaders in the Profession

Leaders across the firm are active members and leaders of numerous boards and professional organizations such as the AICPA, FASB, and GASB. Our involvement with these organizations serves many important purposes, including:

- Our leaders are able to bring their insights on how these bodies' decisions will impact our clients.
- Our support of our teams in these roles sets an example of excellence for others to follow and gives those who are early in their careers something to which they can aspire.
- Our experienced professionals can expand their industry knowledge to serve clients more effectively.
- We stay at the forefront of changing regulations and industry trends—allowing us to keep our clients apprised of pertinent information so they can unlock their full potential.
- FORVIS gains a voice in helping shape the future of the profession.

EDGE TESTIMONIAL



I worked closely with the EDGE team on the development of our New Markets Tax Credit (NMTC) tools and service line. Their thoughtful approach to the product creation process, combined with continued support of day-to-day tasks, has positioned FORVIS to successfully enter a new space.”

– Wes Ernst, Director at FORVIS

National Committee Involvement

AICPA Accounting and Review Services Committee

| Georgia Salinas

AICPA Assurance Services Executive Committee

| Denny Ard

AICPA Auditing Standards Board (ASB)

| Jeff Rapaglia

AICPA Board of Directors

| Matt Snow

AICPA Chair on the Government Audit Quality Executive Committee

| Lindsey D. Oakley

AICPA Dealership Conference Planning Committee

| Tara D. Thomas

AICPA Depository and Lending Institutions Expert Panel

| Randy D. Oberdiek

AICPA Digital Assets Working Group

| Jeremy Goss

AICPA Employee Benefit Plan Audit Quality Center Executive Committee (EBPAQC)

| Dave Leising

AICPA Health Care Entities Expert Panel

| Brian Pavona

AICPA Joint Trial Board

| Angela Miratsky-Figas

AICPA National Commission on Diversity and Inclusion

| Kevin Price

AICPA National Peer Review Committee (NPRC)

| Liz Gantnier

AICPA Not-for-Profit Entities Expert Panel

| Richard Cole

AICPA PEEC Enforcement Subcommittee

| Daniel Sanders

AICPA Private Companies Practice Section Technical Issues Committee

| Bryan B. Bodnar (Chair)

AICPA State and Local Government Expert Panel

| Christopher J. Telli

CAQ Audit Practice Task Force

| Greg Faucette

CAQ Broker Dealer Task Force

| Jim Garner

CAQ Estimates and Fair Value Task Force

| Jim Garner

CAQ Professional Practice Executive Committee

| Jeff Rapaglia

CAQ SEC Regulations Committee

| John Griffin



CAQ Smaller Firm Task Force

| John Griffin

FASB Financial Accounting Standards Advisory Council (FASAC)

| Randy D. Oberdiek

FASB Private Company Council (PCC)

| Adam Roark

FASB Small Business Advisory Committee

| Randy D. Oberdiek

GAO Yellow Book Advisory Council

| Lindsey Oakley

GASB Government Accounting Standards Advisory Council

| Daron Tarlton

GASB Revenue and Expense Recognition Task Force

| Michelle Brekken

| Amy Shreck

GFOA's Committee on Accounting, Auditing, and Financial Reporting

| Amy Shreck

HFMA Chair on the Principles and Practices Board

| Norman Mosrie

NAIC/AICPA Working Group

| Jon Harris

| Jim Garner

NASBA Peer Review Compliance Committee

| Liz Gantnier





Awards

FORVIS is proud to have been recognized with numerous industry awards for client service and employee experiences in our inaugural year. These awards are a direct reflection of our culture and the dedication of our people.



INSIDE Public Accounting named FORVIS a **2022 Best of the Best** public accounting firm. More than 600 firms were evaluated and ranked on more than 50 performance metrics measuring growth and long-term sustainability for clients and employees.



ClearlyRated named FORVIS to its **2023 Best of Accounting** list for providing superior service to clients. FORVIS received a Net Promoter Score® of 84, significantly higher than the industry average of 39.



Comparably ranked FORVIS as one of the nation's top 100 **Best Companies for Career Growth**. Winners are determined based on 20 core culture metrics. The career growth category gauges how employees rate their professional development.



Comparably ranked the firm as one of the nation's top 100 **Best Companies for Work-Life Balance**. FORVIS was the only national accounting firm to appear on the list.



Chief Learning Officer ranked FORVIS No. 17 on its list of **2022 LearningElite Awards**. FORVIS is the highest ranked accounting firm on the list, recognizing the world's top organizations for team member learning and development. A total of 54 organizations were recognized as finalists for the program this year.

BE BUILDERS

Our people are at the heart of our mission. So, too, is our desire to build remarkable careers. We invest in the growth and development of our team members in numerous ways and at all levels. As we look around the firm, it is easy to see a culture that embraces lifelong learning with an emphasis on personal relationships—with each other, with our clients, and with our communities.

New Partners & Managing Directors

At FORVIS, we're building a strong foundation for the future with a commitment to preparing the next generation of leaders. These senior leaders guide our engagement teams to continually excel so that ultimately our clients can benefit from their knowledge.

Congratulations to our 2023 class of partners and managing directors as they embark on an exciting next career phase.

Partners



Jesse Alford
Jackson



Rob Cherry
Tysons



Eric Flueckiger
Indianapolis



Megan Miller
Fort Worth



Tyler Baity
Winston-Salem



Kara Cramer
Kansas City



Melissa Gibbons
Charlotte



Mariah Nielsen
Salt Lake City



Jeff Bodkin
Indianapolis



Krystal Creach
Springfield



Andrew Hejtmanek
Tulsa



Rachel Ormsby
Dallas



Tyler Boss
Wichita



Steven Cunningham
Houston



John Hemmer
Omaha



Nickie Redick
Indianapolis



Matt Brown
Charlotte



Kate Desai
Tysons



Ryan Kelly
St. Louis



Mary Reiser
Denver



Stephanie Carper
Fort Wayne



Sid Dill
Evansville



Alissa Klein
Kansas City



Jeff Roberts
Springfield



John Chennoor
Tysons



Nathan Fitzgerald
Springfield



Kevin Leggio
Kansas City



Stephanie Rocco
Pittsburgh

Partners (Continued)



Jamie Scheffe
Houston



Matthew Smith
Louisville



Tara Thomas
Nashville



Jennifer Williams
Louisville



Brandy Shy
St. Louis



Megan Stern
Chicago



Daniel Waninger
Indianapolis



Ling Zhang
Tysons



George Simon
Oklahoma City



Ryan Swope
Indianapolis



Michael Westerfield
Little Rock



Danielle Zimmerman
Dallas

Managing Directors



Megan Adams
Wichita



John Gamble
Springfield



Tim Klassen
Springfield



William Weatherford
Transaction Advisory



Ricky Brough
Fort Wayne



Kim Grieves
Dallas



Bill Laird
Jacksonville



Mark Weitekamp
St. Louis



Tammy Carter
Louisville



Matt Haase
Wichita



Kimberly Marshall
Chicago



Tricia Yount
Charleston



Rhonda Christopher
Springfield



Tom Haldiman
Kansas City



Kevin Rash
Springfield



Gretchen Cliburn
Springfield



Jason Hamilton
Des Moines



Allison Swaters
Kansas City



Casey Cockrum
Wichita



Tom Hauck
Toledo



Christine Thomas
Talent Alignment Group



Jason Corson
Springfield



Rachel Huenefeldt
Kansas City



Tommy Varnell
Atlanta

Direct Admit Partners



Rob Hartnett
Tysons



Rusty Minnix
Oklahoma City



Amit Mohla
Tysons



Todd Reinstein
Tysons



Jay Kadi
Dallas



Gary Marchand
Professional Standards Group



Joseph Perfetto
New York City



Aaron Schaal
New York City

Direct Admit Managing Directors



Chris Bartell
St. Louis



Stephanie Dunaway-Dickson
Charlotte



Shabab Isaac
London



Kathryn Rigsbee
Raleigh



Bobby Bean
Charlotte



Christopher Fameree
Consulting



Michael Jones
London



Greg Schaller
St. Louis



Bryan Clevenger
Indianapolis



Lee Ferguson
St. Louis



Keith Longacre
Atlanta



Michael Shekel
Tysons



Ron Conner
Oklahoma City



Carlotta Franchin
New York City



Marty Mitchell
Louisville



Reuben Talaiver
Dallas



Jay Cunningham
Indianapolis



Chris Hargrove
Louisville



Jon Morton
Charlotte



Tim Teuscher
Consulting



Mou Debnath
Austin



Jerry Hicks
Atlanta



Chet Patel
Houston



Brandy Tuft
Rogers

Talent Development

A career is a unique journey. While every career has a beginning and an end, there are many different paths forged between the two. Our award-winning Talent Development Team is committed to helping those we serve unlock their full potential through our robust Learning & Development, Leadership Institute, and Executive Coaching programs. With an emphasis on developing the whole person, these engaging and innovative technical and career-enhancing programs are offered through various in-person, virtual, and on-demand formats to support team members in every step of their career journey.

Learning & Development

Our Learning & Development program includes a detailed ecosystem of courses and experiences offering customized learning plans, deep technical and industry knowledge, and career-enhancing skills to help ensure our people are equipped with the knowledge and tools needed to deliver an Unmatched Client Experience.



2023 TRAINING APEX
AWARD WINNER

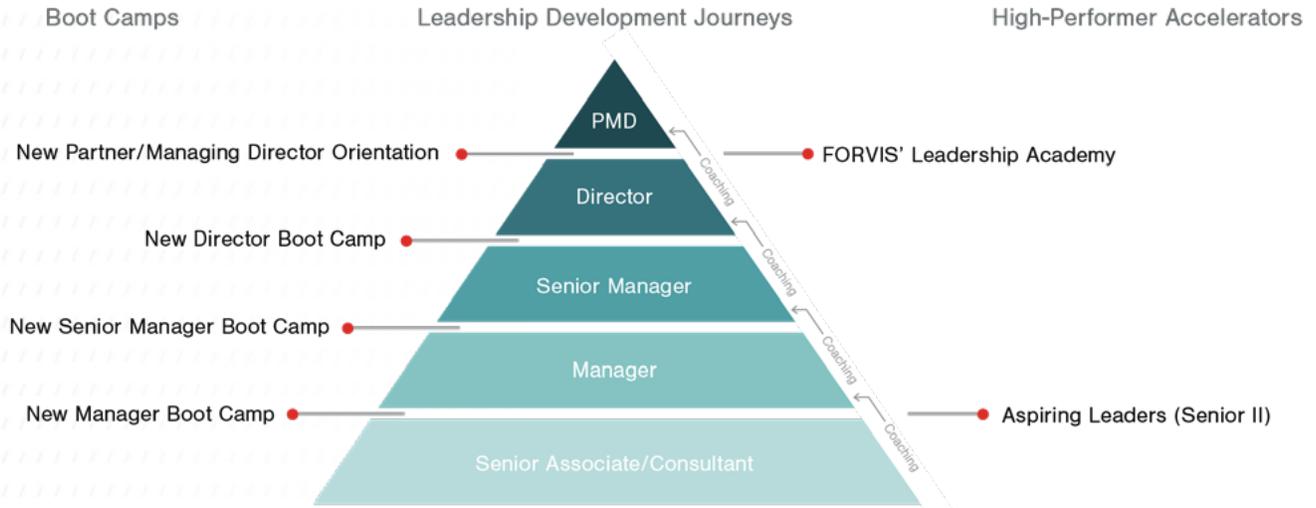
From providing intern, new hire, and level trainings to hosting the 2022 Better Together conferences, where more than 2,000 attendees came together for the first time as ONE FORVIS, our Learning & Development Team provided more than 218,000 hours of CPE credit this year.



Leadership Institute

As an additional investment in the continual growth and development of our people, we offer our team the FORVIS' Leadership Institute. This newly created suite of programs is focused on developing the skills required to excel at being a great communicator, relationship-builder, and strong manager and leader of people.

Professional Development



Executive Coaching

Our Executive Coaching Team provides confidential one-on-one coaching for our partners and managing directors. By leveraging a coaching relationship, our team members can increase self-awareness, tap into values and purpose, harvest new insights, declare and reach goals, drive more impact, and live an integrated life.

Coaching areas include:

- Role transitions for newly promoted leaders
- Transition assistance into FORVIS for our newly admitted partners and managing directors
- Impact coaching focused on accelerating growth and development in targeted areas

EXECUTIVE COACHING TESTIMONIAL



This has been the best experience. I have walked away from each meeting with concrete examples and tools related to my role. I have been able to implement them and have seen powerful results. It is a highlight of my firm growth.”

– Executive Coaching Participant

Talent Acquisition

We know hiring top talent is critical to delivering an Unmatched Client Experience. Our talent acquisition strategy is centered on a progressive approach to attracting and recruiting team members that aligns with our DNA and helps us unlock the potential of those we serve.

Campus Hiring

The campus recruiting team exists to bring high-quality university talent into our assurance, tax, and consulting service lines, as well as supporting the entry-level talent needs within Internal Firm Services (IFS). We approach campus recruiting from two perspectives: University Recruiting Strategy & Execution and Projects & Programs. Our team of senior managers, managers, recruiters, and coordinators is focused on fostering relationships, building the FORVIS brand on campus, and providing data-driven reports to help FORVIS achieve excellence.

Experienced Hiring

The Talent Experience Team focuses on full-cycle recruiting at each stage of the candidate life cycle, from attraction to offer acceptance. Our goal is to build meaningful relationships with top talent across each market through an engaging, streamlined, and seamless recruitment process that elevates the candidate experience and meets the needs of internal hiring stakeholders.

Career Mobility

We are committed to providing opportunities for our people to explore new career paths within various service lines and geographical markets. One way we are championing this effort is through our Career Mobility Survey, which helps us identify team members interested in new and different career paths. By understanding preferences of interest, timing, and location of our team member's desired next career move, we can help build valuable careers while delivering an Unmatched Client Experience.

CAMPUS HIRING



Campus Hires

(Campus candidates who started with the firm in FY 23)

FTE: **553** Interns: **793**

Additional Stats

Extended offers to campus candidates from over **300** schools across the country.

Top reasons campus hires join FORVIS:

- Professional development & growth
- Relationships
- Culture
- Hybrid work environment
- Dedication of care for our people

EXPERIENCED HIRING



New Hire Statistics

Number of applications: **24,363**

Experienced hires: **868**

Direct admit partners: **8**

Marketing & Business Development

Being a builder and helping people unlock their full potential require a unique combination of strategy, tools, and the right team members. Our award-winning Marketing & Business Development Department is focused on the firm's growth engine that creates opportunities for our people, effectively communicates potential solutions to complex problems, and helps our clients succeed.

While the merger, and a new name, created many challenges around building name recognition, integrating complex technology systems, and identifying best practices for our team, it also created many amazing opportunities. Our expanding footprint and industry experience allow for a larger platform to share our brand promise of providing an Unmatched Client Experience. In the coming fiscal year, our team and brand champions will be focused on relentless collaboration, an improved digital experience to better target FORsights, greater specialization for our marketing team members, and a structure that leverages our team's strengths while efficiently providing world-class deliverables and support.

FORVIS' Alumni Network

FORVIS' Alumni Network, comprised of more than 12,000 alumni professionals and retired partner Ambassadors, connects our extended FORVIS community through relationship-building while fueling talent and growth to support our journey forward. We seek to build relationships and continue the career development of our alumni. Whether at our firm for only a short while or an entire career, our alumni add value to FORVIS' culture and the broader community.

The Alumni Steering Committee exists to advise Alumni Network by providing leadership, raising awareness, and advocating for its growth. Eight retired partners serve on this committee to collaborate and accelerate the growth of FORVIS' Alumni Network.



ASSOCIATION FOR ACCOUNTING
MARKETING (AAM) AWARDS IN THE
CATEGORIES OF MARKETING & PR
CAMPAIGNS: INTERNAL COMMUNICATIONS,
DIGITAL ADVERTISING, & WE AAM TO
SERVE COMMUNITY SERVICE



“ FORVIS' values—they're all about holding one another accountable to operate as a cohesive unit. The FORVIS Way and values in action of Be Bold are fresh, aspirational, and compelling with intentional focus on our people and clients.”

– Ted Dickman, FORVIS Ambassador
& Retired BKD CEO

“ I'm proud of how the firm, even as it continues to grow, has never lost its ability to balance its focus on its people while also providing the highest quality service.”

– Heather Norton, Senior Director
of Accounting at Biltmore

OPERATE AS ONE FORVIS

As we came together, we quickly understood that we were more like-minded than different, which made working toward the same goals a natural fit. With trust as our foundation, we are leveraging our full capabilities as ONE FORVIS. This sets up the firm, our team members, and our clients for success today, and into the future.

Better Together as ONE FORVIS

Within weeks of our merger's effective date, we hosted the Better Together Conference in St. Louis, Missouri. This conference brought together more than 2,000 leaders and was the first time most of our partners and many team members had the opportunity to meet their new colleagues. At any point during the conference, the energy and excitement could be felt—a testament to truly being better together as ONE FORVIS. We replicated the Better Together Conference in Washington, D.C., and Orlando, Florida, to bring different constituencies of our teams together.

To conclude the year, our partners, principals, and managing directors gathered in Marco Island, Florida, for our Fusion conference. This conference celebrated our rich legacies coming together to create a brighter future as FORVIS. In appreciation of their support during this period of immense change, attendees brought their significant others to the conference to learn more about our new firm. The highlight of the conference was launching the FORVIS DNA—our purpose, mission, vision, and values in action. In addition to hearing from our leaders, the cross-functional task forces that spent months codifying our DNA shared context on the thoughtful and thorough process that led to its development. It was a moment that will forever be marked in our FORVIS history.

Integration Update

The merger of BKD and DHG was one of the largest in recent accounting profession history and, uniquely, a merger of equals. A merger of equals at this scale created the need for significant change management and integration efforts. To provide strategic oversight and coordination of our firmwide integration, we formed an internal Integration Management Office (IMO) to lead these critical efforts.

Our integration strategy focuses foremost on getting things right for our people and clients and creating a ONE FORVIS culture. As a result, the integration process is deliberately and strategically phased to manage the cadence of change and ensure we have the proper foundational protocols and procedures in place. It has been important to embrace the successful legacies of both firms while creating new processes and ways of working to reflect our forward vision. We approach integration through a future-focused lens, considering our long-term strategic needs to enhance our employee experience, deliver an Unmatched Client Experience, and drive scalable and sustainable growth.



Participation in our quarterly feedback surveys has been steadily increasing, with thousands of team members sharing their voice in each survey and expressing overwhelming support for the merger. Confidence in senior leaders has not wavered through the integration process—a true testament to our “Better Together” vision behind the merger. Change is never easy, yet our team has embraced our forward vision.

Assurance Integration

The Assurance integration strategy is driven by the practice’s unwavering commitment to quality and delivering an Unmatched Client Experience. Maintaining integrity, independence, and objectivity in our Assurance services is critical to fulfilling our purpose at FORVIS. National Assurance Leader John Kmetz assembled a cross-functional National Assurance Committee with representation from Assurance Professional Standards Group (PSG) and Assurance Methodology & Innovation (AMI) to develop a path forward toward the long-term growth of a high-performing practice. The committee focused on aligning technologies and methodologies and ensuring the quality and confidence in our audits remain strong.

Strategic investments helped us drive our forward vision for the practice. We invested in expanding the Assurance leadership team with new professionals that bring unique skill sets and technical knowledge to the team. New data tools were added to our technology suite to increase our capacity to deliver services and provide robust insights and analysis. We also considered the next generation of assurance services, as we explored future enhancements to services in this area with sustainability as just one of those areas. By investing in innovation, expanding our industry intelligence, and enhancing our systems, the Assurance practice at FORVIS helps our clients make informed and strategic decisions to prepare for what is next.

Tax Integration

The Tax integration strategy is driven by the vision of creating “One Great Tax Team” to serve our clients. The goal is to effectively have all members of Tax, including tax-related consulting services and NEAR, collaborate in providing an Unmatched Client Experience that sets FORVIS apart in the market. Our “One Great Tax Team” is led by Trey Ackerman serving as National Tax Leader. Jesse Palmer also serves as the leader of Tax Professional Standards Group (PSG).

Our industry continues to evolve with updated guidance and regulations for U.S.-based and global clients. To help navigate this change and uncertainty, our professionals provide a personalized approach leveraging our expanded suite of tax compliance and consulting services. Our team continues to invest in resources and technologies to help enhance the client experience and reduce burdens on our clients and team members. During our integration efforts, we prioritized looking for new ways to create capacity among our teams to unlock their full potential and deliver an Unmatched Client Experience.

COMMUNICATING CHANGE



The Integration Management Office, Change Hub, and Strategic Communications Team work together to build robust and innovative approaches to communicating change. This team of strategic advisors coordinates and supports all changes brought about through integration. Using a consistent methodology and approach, we can achieve positive changes faster and advance the effective fulfillment of our mission.



RAGAN'S EMPLOYEE COMMUNICATIONS AWARDS

Technology Integration

Firm Technology Services (FTS) moved with strategic purpose and agility to integrate two great firms while maintaining an Unmatched Client Experience for our team members. Our FTS team recognized that the size of our new firm required a different approach to delivering high-quality services and support to users and clients globally.

Our strategy is guided by three principles—simplicity of design, security of client and firm data, and performance of systems. We are looking for new ways to innovate and evolve our offerings with limited disruption for our people and clients. This multiyear effort is focused on positioning FORVIS to scale for increased operational efficiency, maintaining rigorous security standards, and supporting our new firm's growth and needs.

Consulting Integration

The commitment to deliver an Unmatched Client Experience is at the forefront of our integration strategy to unite the two legacy consulting practices, each with unique specializations and strengths. Under the leadership of Jerry Henderson and David Evans, integration is a collaborative effort with cross-functional teams working in unison to determine the best path forward for FORVIS. Dedicated integration workstreams for each of our Consulting services have created a personalized process to integration, similar to how we recognize there is no one-size-fits-all way to approach the unique challenges of our clients.

True to our name, we continue to anticipate our clients' evolving needs through strategic investments, including the new TALENT SHIFT[®] gig workforce solution, and the asset acquisition of ProBank Austin which provides education, loan review, regulatory compliance, asset/liability and interest rate risk management, and capital advisory services to financial institutions. As a result of our integration efforts, the Consulting practice offers deepened industry knowledge, greater market scale, and expanded services and resources to serve the largest global clients to the most agile middle-market clients.

LEAD WITH INTEGRITY

At FORVIS, integrity trumps economics every time. An uncommon commitment to excellence is woven into our DNA. Ensuring that our approach to quality and risk was aligned and well articulated was among our highest priorities when we first came together. This constant commitment enables us to continue to set the standard for our profession and gives our teams confidence that they will always be supported when putting integrity first.

Quality Management

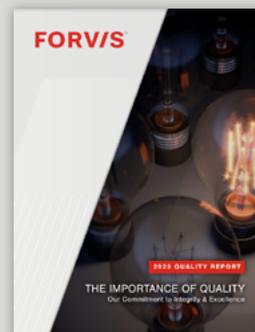
An integral part of our mission is demonstrating an uncommon commitment to excellence. This makes achieving high-quality services a foundational component of living out our mission.

The merger created an opportunity for FORVIS to consider how we could take our legacy quality management programs and build upon them as we looked to the future. Starting on June 1, 2022, we introduced aligned quality management processes in all service lines, including acceptance and continuance of clients, required consultations, and required concurring reviews. Aligning these fundamental practices allowed us to focus on enhancements to our process and structure.

FORVIS created two new positions in the quality management organizational structure that enhance our ability to meet our commitment to excellence. First, we created a chief quality officer position to oversee the activities of our Tax, Consulting, and Accounting and Assurance Professional Standards Groups (PSGs). Our Chief Quality Officer affirms that our systems are complementary between service lines and are proactively adjusted to address new service offerings and delivery methods.

We also created a separate practice monitoring function to provide greater independence when monitoring the effectiveness of our quality management system. Our new National Director of Practice Monitoring will help us enhance our quality monitoring and root cause analysis process to continually improve our systems.

A critical component of our quality management is having a highly trained professional service team. Our Learning & Development Team, working closely with the service line PSG teams, offers live and on-demand training through various delivery methods to help ensure that all our professionals have the training they need. In addition, our PSG teams provide guidance and tools on recent developments in tax and accounting to assist our teams in helping our clients stay current on emerging issues. In the past year, this included extensive guidance and tools related to adopting FASB's new leasing standard and IRS' new rules regarding capitalization of research and experimentation costs.



In March 2023, we released our **2023 Quality Report**, which provides more detail on the items described above and other essential components of our quality management system.

Risk Management

Risk management is fundamental to who we are as a professional services firm. It is embodied in our firm philosophy of “See Risk, Seek Help,” which empowers us to help identify, manage, and mitigate firm risks. When FORVIS created its DNA and defined its Unmatched Client Experience, risk management principles were embedded in our firm’s culture, informing and strengthening our ability to provide high-quality services to our clients.

Our prudent approach to risk management also extends to our client acceptance and continuance processes. We are selective in the clients we choose to serve, valuing their ethical behavior and operational stability over economic benefit to the firm.

Our philosophy toward risk management is evident in our firmwide enterprise risk management initiative and our commitment to continually enhancing our IT security posture, both of which help FORVIS balance risks with opportunities.

Following the merger, we also invested structurally in the firm’s risk management area by creating the National Director of Risk Management role, in addition to our ongoing investments in bolstering our risk team. And we invest in our client service teams with annual required trainings focusing on risk management, integrity, and ethics, and IT security.

Corporate Social Responsibility

FORVIS is developing a Corporate Social Responsibility (CSR) strategy for the firm. The pillars of focus for our CSR framework are aligned with our Environmental, Social, and Governance (ESG) objectives, and include Inclusion & Diversity (I&D), Philanthropy, Supplier Diversity, Governance Policies, and Accessibility, some of which are discussed in other relevant sections of this report.

In simple terms, ESG is a set of metrics and standards for a company’s operations—most of which have not traditionally been associated with a company’s financial picture—targeted to meet growing stakeholder demand for ESG information about the impact the company is having in these areas and how that impact is being addressed annually. As part of these efforts, we are committed to taking on a more significant role in seeking and implementing actions, behaviors, and initiatives to address sustainability opportunities and deliver long-lasting, high-impact solutions. We are currently undertaking a substantial project that allows us to calculate our emissions data, identify areas for improvement, and integrate best practices into our organization.

Our overall CSR strategy involves driving impact and building unrivaled relationships in the communities we serve. One way we seek to achieve that impact is through our Supplier Diversity program. This program aims to make meaningful contributions to the economic growth of diverse vendors and business enterprises. We believe that greater diversity in our supply chain will bring enhanced innovation and ideas to our firm’s performance. Through these strong partnerships and resources, we can help these businesses thrive and support our commitment to CSR. We recognize many women, minority, veterans, disabled, and LGBT-owned business enterprises.

DELIVER UNMATCHED CLIENT EXPERIENCE

When we talk about an Unmatched Client Experience at FORVIS, we are specifically referring to how we work with our clients and our team members to deliver value in a way that exceeds expectations and unlocks potential. We are proud to be consistently recognized for the experience that we share with our clients and with each other.

Our Secret Sauce: Unmatched Client Experience (UCX)

An uncommon commitment to serving our people, communities, and clients is who we are; it's in our DNA. One of the first projects under the new banner as FORVIS was to codify those deep passions in a book. A task force was formed, and a labor of love created the cultural pillars that form the foundation for how we serve at FORVIS. We call it **Unmatched Client Experience: The FORVIS Way in Action**, and we couldn't be prouder to use it as our road map for service excellence.



UNMATCHED CLIENT EXPERIENCE



EXPLORE THE FORVIS UCX BOOK IN DEPTH. SCAN THE QR CODE FOR A DIGITAL COPY

When your brand promise centers around providing an Unmatched Client Experience, it's imperative that you measure, learn, and grow through a process to gather client feedback. We do this through our annual Client Experience Survey to help us understand how we deliver on our defined standards.

So how did we do? We're happy to report that by using an independent party to conduct our survey and a Net Promoter Score® (NPS®) to benchmark our results objectively, FORVIS ranks very high in our profession in how we serve our clients with a score of 83. Through our client surveys, we also found that 70% of respondents rated our service as "Excellent" as it relates to our Unmatched Client Experience standards. While it would be easy to rest on those laurels, we're driven to get even better and leverage client feedback to improve critical processes. Thank you for taking the time to let us know how we can better serve you.

We look forward to expanding and bringing our client experience programs to new heights in the coming year to serve you better.

CLIENT EXPERIENCE 2023 SURVEY RESULTS

NPS: **83**

UCX Top Box: **70**
(Percentage of clients who responded "Excellent" to UCX standards)

UCX Average: **89**

Growth

Organic Growth

Growth is critical for any organization that wants to be successful, but FORVIS does not aim to grow simply for the sake of it. If we provide an Unmatched Client Experience and follow the FORVIS DNA, we will offer many opportunities for our teammates and clients to grow and prosper in the future.

The firm has experienced solid organic growth, exceeding expectations in its first year. This is in addition to a remarkable year before the merger, where the two legacy firms grew an aggregated 17%. Our growth of 13.3% exceeded our year one expectations, with many factors contributing to this achievement.

We go to market with 10 core industry practices across our entire footprint, each of which has seen considerable growth this year. These core industries include:

- **Commercial Products** – Matt Wood, National Industry Leader
- **Construction & Real Estate** – Jason Myers, National Industry Leader
- **Dealerships** – Buddy Dearman, National Industry Leader
- **Financial Services** – Jason Rader, National Industry Leader
- **Insurance** – Matt Church, National Industry Leader
- **Healthcare** – Danielle Solomon, National Industry Leader
- **Nonprofit, Education, & Public Sector** – Tondee Lutterman, National Industry Leader
- **Private Client** – Holly Pantzer, National Industry Leader
- **Private Equity** – Scott Linch, National Industry Leader
- **Technology & Services** – Billy Parker, National Industry Leader

Furthermore, Assurance, Tax, and Consulting service lines have seen great success, thriving off the combination of our two legacy firms.

In going to market as ONE FORVIS, we immediately noticed several synergies across our 10 industry-serving teams as well as our Assurance, Tax, and Consulting service lines. Industry practices at different maturity levels helped each other with growth strategies across our footprint. The geographic locations of legacy firms matched up favorably, and identified areas of overlap were able to be streamlined in our first year.

Almost immediately upon integration, our blended teams were finding ways to go to market and serve clients. We suddenly became a premier, national career destination for talent at all levels that saw FORVIS in a new light.

We also enjoyed several pursuits that we believed would come to life after the merger date. These strategic alignments enabled us to win additional work, maintain client relationships, and create new services for our clients. We maintained a listing of those achievements to show how we are “Better Together” from the outset, and eventually, there were just too many success stories to continue our inventory—a great sign! The deal premise of our teams uniting to serve our clients showed up immediately and often in meaningful ways.

Growth Investment Fund

Investments are critical to our strategy to sustain our forward vision for the next 100 years. One of our first actions after coming together was to launch FORVIS’ Growth Investment Fund (GIF), approved by our Governing Board in June 2022. The GIF supports transformative growth initiatives, which ultimately create rewarding career paths for our people.

Our leaders and partners place value on building an entrepreneurial spirit and are willing to invest for the future. Our GIF will help us accelerate our growth potential by sharing some of the financial risks of bold investments while capitalizing on the innate desires of our leaders to grow wisely. We will report the results of our investment activities to our firm’s partners and managing directors each year, sharing how this innovative program is driving profitable growth and ensures that our firm remains relevant for future generations.

Many of our historical and new investments are having a transformative growth impact on our firm, bringing our forward vision to life. Relatively early in our first year, the Senior Leadership Team and Governing Board approved the following investments:

Funding for a new office location in South Florida.

Funding to support the expansion of our large corporate tax practice.

Funding to support the growth of our Technology & Services industry team across the country.

Funding to support the growth of our Nonprofit, Education, and Public Sector Practice in the Mid-Atlantic and Southeast regions.

We encourage each of our team members to Be Bold in sharing their transformative growth ideas with our leaders. Some of our best ideas come from those who understand the market and see opportunities for FORVIS to consider as we build a better future together.

Market Expansion

Reflecting on our history, we recognize many examples of our firm being bold and planting a flag in a new city with significant, long-term growth potential. Among others, markets like Nashville, Tampa, Louisville, and London⁴ have proven to be rewarding locations to build new teams and serve existing and new clients. In moving forward, we will continue to identify new strategic markets for FORVIS to call home, as we have done with South Florida and Toronto⁴ in fiscal year 2023.

We have found that one of the best ways to ignite a new market is through internal resources that have an interest in a new and exciting career opportunity by relocation. Our new career mobility process and the FORVIS Growth Investment Fund allow our team members to submit their preferences for mobility across our expanded footprint. Investing in our people is fundamental to our values and allows each team member to unlock their full potential and be their best selves.

⁴Services outside the United States are provided through our subsidiaries and/or affiliates.

Acquisitions

Integrating talented firms is another key driver of our inorganic growth strategy at FORVIS and represents investments over and above our GIF. In FY 22, we collectively added five new locations prior to our merger day, all of which have seen success, and in FY 23, we welcomed the following groups to our firm:

- **TALENT SHIFT, LLC** is a talent marketplace that connects gig workers with projects that fit their skill sets and their desire for hybrid and flexible work schedules. TALENT SHIFT helps our clients who need skilled loan staff resources to support business activities on a fixed-term basis.
- **ProBank Austin**, a nationally respected provider of education, loan review, regulatory compliance, asset/liability, interest rate risk management, and capital advisory services to financial institutions, joined FORVIS by an asset acquisition adding approximately 50 team members to the firm. These team members reside in Nashville, Louisville, and Toledo.
- **James R. Minnix, CPA, Inc., PC** is a provider of tax and outsourced accounting services to clients throughout Oklahoma, tracing its history back to the 1960s. With offices in Oklahoma City and Clinton, we added 14 new team members to the firm, including Rusty Minnix, who serves as a partner.



The Growth Investment Fund has enabled us to invest in key talent markets like New York, California, Washington, D.C., Tampa, and Raleigh among others which allow us to successfully execute our growth, service, and talent strategies nationally, benefiting our team, clients, and communities today and for many years to come.”

– Trey Ackerman, National Tax Leader



Growing a significant Nonprofit, Education, and Public Sector practice in the Mid-Atlantic and Southeast regions was identified early during the merger as a key opportunity, and it is rewarding to see it now come to life with the support of the Growth Investment Fund. In addition, the guidance and support from firm leadership help to drive accountability and accelerate results.”

– Tondee Lutterman, National Industry Leader
Nonprofit, Education, & Public Sector



CLOSING

Thank you for reading the 2023 Integrated Report. It's always worth taking a moment to pause and reflect on the noteworthy accomplishments of our people and the dedication they demonstrate each day for our clients. FORVIS' first year has exceeded our lofty expectations through a bold new brand, an expanded national footprint, and new ways of serving clients.

Yet for FORVIS, looking back is valuable to evaluate what comes next. Forward vision defines us. We are committed to building on the extraordinary foundation we have laid during the past year and to devoting our next year—and the next 100 years—to unlocking the potential of our people, clients, and communities.

FORVIS

2023 | INTEGRATED REPORT



FORVIS, LLP is an integrated professional services firm with a global reach and a passion to drive businesses forward. The firm's 6,000 dedicated team members provide an Unmatched Client Experience[®] through the delivery of assurance, tax, and consulting services in all 50 states and internationally. Ranked among the largest public accounting firms in the United States, FORVIS upholds an unwavering purpose to help those we serve unlock their full potential—including our people, our clients, and our communities. Visit forvis.com for additional information.