



AAFCPAs
great minds | great hearts

2023 Impact Report



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Introduction

Serving clients, providing exceptional value, and making a positive impact on your business and life is a privilege. Equally rewarding are opportunities to come together as an organization and broaden our impact by touching the lives of so many in the communities we serve. In this Impact Report, we are thrilled to share the economic and social results of our efforts throughout the past year.

Perhaps our Managing Partner [Carla McCall, CPA, CGMA](#) said it best in our 50th anniversary tribute video: “When I think of our 50 years of impact, I think about the difference we’ve made in people’s lives.” [Watch the full video, here.](#)

Our longevity and impact, though, would not have been possible without the loyalty and backing of our clients. We thank you sincerely for allowing us the opportunity to perform meaningful work each day—work that piques our interest, reflects our values, builds authentic relationships, and makes a positive, lasting difference in the lives of so many.

Highlights

\$250,000+

donated to nonprofits through our direct-giving program in 2023

70%

of our firm subscribes to our DEIB Microsoft Teams channel (+15% over last year)

60

children gifted toys in our December toy drive for Nurtury Early Education

\$26,000+

donated by team members and our company match for GivingTuesday in 2023

24

20-inch bicycles for children aged 6 through 10 donated to MSPCC

15%

of our team members self-identify as non-white

\$200,000+

donated in support of GivingTuesday throughout the eight years we have participated

49%

of our leadership are women and/or minorities

29%

of our partners and 44% of our managers are women

13

languages are spoken within our organization including Albanian, Arabic, English, French, German, Hindi, Mandarin Chinese, Russian, Spanish, Swedish, Swahili, Filipino and Ukranian

#GreatMindsGreatHearts

“Working with [AAFCPAs] through my younger years, they really gave me an appreciation for nonprofits and put me on the road to where I am now, CEO of Boston MedFlight.”

– Maura Hughes, CEO, Boston MedFlight
(Nonprofit Client, AAFCPAs Alumna)



“There are many things that make me proud to be associated with AAFCPAs! The compassion and the caring that is in me today is because of the opportunities allowed me at AAFCPAs.”

– Norma Mendilian, CFO, Boston MedFlight
(Nonprofit Client, AAFCPAs Alumna)

#GreatMindsGreatHearts

“AAFCPAs has grown very impressively and yet managed to hang on to a value structure that would make the first generation very proud. None of this would happen without an awesome workforce.”

– Eric Haartz, CEO
Haartz Corporation (Commercial Client)

“The thing I’m most proud of is our commitment to give back to the nonprofit community. We also encourage our employees to get involved with nonprofit organizations to make a difference.”

– Jack Finning, CPA, CGMA, CBEC, Partner



“Being inspired to help other people, I think that is the greatest impact AAFCPAs has made on me. I’m always grateful for everyone at AAFCPAs for coming in and trying to make a difference.”

– Sorie Kaba, CPA, Partner

Our fiscal year spans January 1 through December 31. Unless otherwise noted, references throughout this report occur during our fiscal year 2023 (FY23). This is AAFCPAs’ fourth annual Impact Report.



About AAFCPAs

AAFCPAs is a premier CPA and consulting firm based in New England and considered an attractive alternative to national CPA firms by discerning clients who appreciate exceptional value. We provide audit, tax, accounting, and advisory solutions to nonprofit organizations, commercial companies, and high-net-worth individuals/estates. Since 1973, our sincere approach to business and service excellence has built a thriving 325+ employee firm driven by an altruistic mission to improve the economic well-being and quality of life for all our constituents. We are proud to donate 10 percent of our net profits annually to nonprofit organizations. In 2023, we proudly celebrated 50 years of Impact!

AAFCPAs is an independent member of PrimeGlobal, the third largest CPA firm association in the world with 300+ member firms in more than 100 countries. This provides our clients with seamless national and global coverage along with an advantageous pay-as-you-use model.



50 Years of Impact

In 2023, AAFCPAs paid tribute to [50 years of Impact](#) (1973–2023)!

A Firm Led by Values

Our actions and decisions are driven by a set of ethical practices and behaviors modeled by the leadership team, with a focus on ethical behavior, character, and values.

Our Mission

Our mission is to improve the quality of life and economic well-being for all constituents. This includes our team members, clients, partners, vendors, and communities.



Our Core Values

We live them: Focus on the Client, Keep Our Commitments, Continuous Learning, Treat People with Dignity and Respect, Excel, and Community Service.

Our Strategic Pillars

Three strategic pillars form the foundation we use to achieve our long-term vision: people, culture, and growth mindset. Without the first two, we cannot achieve the third.

The Joel Aronson Character Award

In 2023, [Olga Yasinnik, CPA, MBA](#) was honored with our annual partnership-nominated Joel Aronson Character Award, which recognizes the team member who best epitomizes the honorable character, work ethic, and client dedication of Joel Aronson, the founder of AAF Wealth Management.

Past Recipients include [Julius Wakaba, CPA \(2019\)](#), [Nichole Reilly, CPA, MBA \(2020\)](#), [Rich O'Neil, CPA \(2021\)](#), and [Alison M. Williams, CPA, MSA \(2022\)](#).



[Hear Olga share what it feels like to be the 2023 Character Award recipient.](#)

Carla McCall, CPA, CGMA; Olga Yasinnik, CPA, MBA; Joel Aronson

Charitable Giving

Nonprofits enrich our lives, our communities, and our shared humanity. That's why we donate 10 percent of our net income annually back to nonprofits. While giving has been part of the firm since our inception in 1973, we formally launched our 10 percent back to nonprofits program in 2015.

“Generosity, service, and good corporate citizenship play an integral role in our mission and culture. We are energized and uplifted by the collective generosity embodied by those at our organization and the enthusiasm shown by everyone who gave what they could to make this year’s collective contribution so incredibly meaningful.”

— Carla McCall, CPA, CGMA, Managing Partner of AAFCPAs



How do we invest 10 percent into our communities each year?

AAFCPAs' Charitable Foundation donates in a number of ways including our generous employee match and direct-giving programs to further our positive impact on society.



Direct Giving



Employee-Matching Gifts



Donations of Service



Direct Giving

Sponsorships and Donations

Cash contributions and sponsorships provide necessary support to dedicated nonprofits who do so much to improve the quality of life in our community. Our nonprofit clients are our primary beneficiaries, with financial support offered in the form of donations, contributions to capital campaigns, galas, fun run/walks, and multi-year pledges. In 2023, AAFCPAs donated more than \$250,000 to charitable nonprofits through our direct-giving program.

Annual Holiday Donation

In lieu of a physical holiday card or gift in 2023, we donated to our client RefugePoint, a nonprofit organization that works tirelessly and compassionately to provide lasting solutions to refugees who have lost their homes, communities, livelihoods, and loved ones. RefugePoint offers vital assistance to support self-reliance and resettlement while providing vital pathways to safety. Based in Cambridge, Massachusetts, the organization has helped more than 119,745 refugees to date across 63 countries worldwide.



“With this donation, we hope to play a small role in helping refugees access pathways to safety and self-reliance.”

— Courtney McFarland, CPA, MSA, 340B ACE, Partner





Employee Matching Gifts

Year-Round Employee Match

When our team members donate to client beneficiaries, we increase that with a 50 percent match. Our low minimum donation amount for matching gift requests ensures the program is accessible to donors of all levels. This is just one more way we celebrate the spirit of philanthropy, align with our employees' values, and further our collective impact.

GivingTuesday Match

When our employees donate to any charitable nonprofit during the month leading up to GivingTuesday, we double that with a 100 percent match. This enhanced match helps to broaden support to benefit the causes most near and dear to our team members.

Collectively, AAFCPAs' team members and our employee matching gifts program donated more than \$26,000 to mission-driven nonprofits during the 2023 GivingTuesday drive. AAFCPAs' eight-year donation total for the GivingTuesday movement is nearly \$200,000.

Toy Drive Benefiting Nurtury Early Education

AAFCPAs participated in the 2023 toy drive by collecting gifts for 60+ children at Nurtury Early Education. Nurtury Early Education is a mission-driven nonprofit providing early care and education to 1,000 of Greater Boston's youngest and most vulnerable children and their families.

“Every year at Nurtury Early Education, we amass an army of holiday helpers to help spread joy to the children in our center-based and family childcare programs. A wrapped holiday gift means the world to the children in our care, and we are so grateful for AAFCPAs' support of our holiday gift drives over the years.”

— Stephanie Ellington, Director of Development,
Nurtury Early Education





Service Donations

We believe business can be a conduit for social change. This extends throughout the year, with in-house resources committed to making it easy for team members to contribute their time to nonprofit causes including company-led volunteer events.

Bike Build Benefiting Eliot Community Human Services

Instead of throwing an elaborate party for our Golden Anniversary, AAFCPAs organized a community service event, a collective bike build to coincide with our 2023 annual employee outing. During the event, 12 teams worked in tandem to assemble 24 20-inch bicycles suitable for children aged 6 through 10. Bicycles were then fully inspected and presented to AAFCPAs' client, the Massachusetts Society for the Prevention of Cruelty to Children (MSPCC), a division of Eliot Community Human Services.

Thanks to the enthusiasm, commitment, and talent of AAFCPAs employees, 24 children healing and adjusting to changes in their lives received their very own bicycle including an age-appropriate safety helmet, notes of encouragement, and a bike lock to use as they cruise into a brighter future.



These children have likely never owned a bike of their own, and these gifts will mean the world to them."

— Melanie S. Lima, Director of Development at MSPCC

In 2023, AAFCPAs employees came together to generously donate their time and energy to:

- Mother's Day Weekend cleanup benefitting Brookview House
- Painting for a Purpose benefitting Catholic Charities Worcester County
- Big Sisters Boston Big or A Day (BFAD) Information Session

AAFCPAs' also made cash donations to these charities to help sustain their programming.



Voluntary Board Service

Many employees contribute their expertise as volunteers on nonprofit boards of all sizes as a way of giving back and making a difference.

In 2023, close to 60 nonprofit boards received voluntary strategy, oversight, and fiduciary accountability from our skilled team.

“Nonprofits play a crucial role in enriching our world. As a CPA, the most impactful way I can contribute is by overseeing the financial health of a nonprofit, and by educating donors and fellow board members on best practices for financial management. It’s about ensuring that we’re not only sustaining but thriving. This commitment stems from a personal place. When my family and I arrived in the US, a nonprofit was there for us, offering essential household items and teaching English and computer skills. That generosity left a lasting impression, inspiring me to give back now that I have the means to do so. Today, my homeland is struggling to survive, and I serve on a board to help support Ukraine’s fight for freedom.”

— Olga Yasinnik, Director, AAFCPAs and Board Treasurer, Sunflower of Peace Foundation

“Matt’s contributions have been pivotal to our journey at TFS, bringing transparency, efficiency, and growth in ways we couldn’t have imagined. By refining our process for estimating the value of donated goods, Matt has not only enabled us to better track and monitor our resources but also significantly enhanced our reporting capabilities, showcasing the full spectrum of our impact to our board and the wider community through the IRS Form 990. His initiative in creating our first comprehensive budget, coupled with a grant tracking system, has been a cornerstone in our financial strategy, allowing us to meticulously plan and adjust our operations with a clear vision of our financial health. Moreover, his efforts in elevating the quality of our financial presentations through annual reviews by seasoned professionals have strengthened our organizational credibility. Beyond these invaluable contributions, Matt’s dedication to fostering a sustainable financial model has been instrumental in securing a brighter future for our team, ensuring that recognition and rewards are aligned with our collective hard work and dedication. His commitment to equity and growth within TFS has not only uplifted our team but has set a new benchmark for operational excellence in the nonprofit sector.”

— Elizabeth Hart, Executive Director, Tailored for Success, Inc.





Educational Resource

We are honored to act as a trusted educational resource for our clients, ensuring they are well informed and prepared for upcoming opportunities or challenges. We provide insight on what they need to know in order to navigate financial and operational decisions with confidence.

Some examples of education provided in 2023 included:

- The EQ Leader in Industry 4.0: An Introduction to Emotional Intelligence Leadership in the Digital Age
- Accounting Standards Update 2023
- Tax Planning Guide for Businesses & Individuals (2023–2024)
- Guide to Automating Manual Data Entry, Forms Processing, Registrations, and More.
- Effective Strategies for Streamlining Employee Time Off
- How to Level Up Financial Planning & Analysis
- Job Change? Now is a Good Time to Revisit Your Financial Plan
- Nonprofit Educational Seminar



Diversity, Equity, Inclusion, & Belonging

Embracing diversity, equity, inclusion, and belonging is a commitment rooted in our firm's distinctive culture and our core value of continuous improvement. We believe that by nurturing an environment where every individual feels valued and empowered, we contribute not only to our own growth but also to the broader community. It's not just a business imperative; it's a testament to our belief in the collective strength that diversity brings to all aspects of our society.

Our DEI&B Timeline



**CEO Action is the largest business-led initiative to advance DEI in the workplace. Employees were invited to sign the pledge to check their bias, speak up for others, and show up for all.*



What's the **B** deal?

In 2023, our Council added B to its name. The B in DEIB stands for belonging. This has been added to highlight how people feel at work. Belonging is about creating a culture where people feel like they belong and can be themselves.

Belonging is important because:

- Feeling like an outsider at work can be painful and anxiety-inducing.
- When people feel connected to others, it can have powerful results.
- Feeling a sense of belonging is emotionally essential in friendships, within families, and particularly in the workplace.

Our DEIB Mission

To have a workforce that is as diverse as the clients we serve and a workplace that embraces the talents, perspectives, ideas, and experiences of all employees, fosters inclusion, requires respect, and promotes equal opportunities to achieve one's full potential.

Resources Dedicated to Advancing the DEIB Mission

Our HR department, learning and development, and two active employee-led councils are invested in and dedicated to providing tools, resources, events, and thought leadership to the firm's DEIB mission.

Our DEIB Council

Our DEIB Council has developed and implemented a sustainable strategic plan in support of our DEIB mission. We evaluate this plan annually to ensure we focus resources in a way that best serves our employees and society.

Our DEIB Council 2023 goals included:

- Increase our workforce's feelings of inclusion and belonging
- Increase our workforce diversity
- Ensure our goals and actions are sustainable and that there is accountability
- Increase firm-wide engagement



Women's Opportunity Network (WON) Employee Resource Group

WON was established in 2011 to support and advance women within the firm. We noticed a concerning trend where women were leaving both the firm and the profession. This was largely attributed to the disproportionate burden women face in caregiving responsibilities for child, elder, and home care.

Since this time, WON has provided mentorship opportunities and has opened an ongoing dialog on intersectional experiences and what it's like to be a woman in the workforce and in the accounting industry. Members collectively advocate for broader representation and foster a culture of self-advocacy. While its primary motivation is to improve the growth and retention of women at AAFCPAs, the group has enhanced professional development and work-life programs for all team members. Today, the goal of WON is to provide women with connections, confidence, and capability to excel in their career.



DEIB Events

In 2023, we hosted the following events to foster a culture of inclusion and belonging.

How to be Antiracist – March 2023

As part of our Courageous Conversations Lunch & Learn series, we focused on anti-racism, an active way of seeing and being in the world as a means for transforming it. We hosted guest speaker Traci Griffith, Director of the Racial Justice Program at the American Civil Liberties Union of Massachusetts. Traci works to build and sustain an equitable, anti-racist culture centered on the voices and experiences of individuals and communities that have been historically marginalized due to race or ethnicity. In this session, employees were provided with a basis for taking action to dismantle and eliminate racism at personal, ideological, and institutional levels.

“In this session, employees were provided with a basis for taking action to dismantle and eliminate racism at personal, ideological, and institutional levels.”

Results of the 2022 DEIB Survey – June 2023

As part of the firm’s commitment to sustainable and accountable DEIB initiatives, the DEIB Council presented the results of its annual employee survey along with recommendations for the future to AAFCPAs’ partner group.

2022 Impact Report & 2023 Goals – July 2023

Speakers from multiple departments and functions came together to present the 2022 Impact Report, which fostered an even greater sense of pride and connection.

Understand Legal Issues of LGBTQIA+ Populations – August 2023

Guest speaker Janson Wu, former Executive Director of AAFCPAs’ client GLAD and now Senior Director of State Advocacy and Government Affairs at the Trevor Project, joined AAFCPAs for a one-hour virtual session to provide a better understanding of the legal issues faced by LGBTQIA+ individuals. Topics included transgender rights, marriage equality, family law, employment discrimination, and the rights of LGBT elders.

International Potluck –September 2023

In September 2023, the DEIB Council hosted its annual International Potluck event, where team members from diverse backgrounds and cultures shared food and drinks.



Unconscious Bias Training –September 2023

Guest speaker Jina Etienne, Certified Diversity Executive (CDE), joined us for a two-hour, firm-wide unconscious bias training titled Flying on Autopilot. As a group, we broke down bias and looked at how automatic patterns of thinking are formed and how they can affect the decisions we make. Participants discussed how autopilot thinking drives assumptions, beliefs, and attitudes that unconsciously influence our actions and decisions. We walked through a process framework for identifying and disrupting autopilot thinking so we could be more aware and intentional in our workplace interactions and decision making.



WON Family Outing – October 2023

WON hosted its fifth annual apple picking event at Tougas Farm in Northborough, MA.



Festivals and Celebrations Around the World –December 2023

Participants came to hear team members from India and Greece generously share insight into their native culture including celebrations, food, and decorations.

Adding Pronouns

Pronouns were added as an optional field to our email signatures in 2023. This initiative was championed by the DEIB Committee following a 2022 Pronouns Lunch & Learn. While we permit employees to include their pronouns in their email signatures, we respect everyone’s right to make that decision for themselves. We encourage everyone to bring their authentic selves to work and to understand, accept, and value the differences between us.



Additional Learning & Development Topics

DEIB efforts are directly linked to our learning and development (L&D) and career advancement strategies as a means to leverage their combined power. Our L&D and career advancement teams curate curriculum and resources to better support those coming into the organization and those advancing their leadership, managerial, and supervisory skills.

DEIB efforts are directly linked to our learning and development (L&D) and career advancement strategies as a means to leverage their combined power.

Our DEIB vision is integrated into the following training opportunities.

TypeCoach Training

TypeCoach Training provides coaching to team members on diverse communication and work styles. Our teams learn how to develop a conscious strategy for each individual's needs in terms of connection, clarity, and feedback to enhance understanding, show respect, foster rapport, and strengthen teamwork. We also share ways for optimizing strengths, respecting communication and workstyle differences in others, and devising strategies for working with diverse teams.

MassCPAs Women's Leadership Summit (October 2023)

AAFCPAs' partners are making an impact. In 2023, [Courtney McFarland, CPA, MSA, 340B ACE, Partner](#) was honored with the 15th Annual MassCPAs Women to Watch Award in the Experienced Leader category, which recognizes outstanding women in the accounting profession. Courtney was honored and included in a panel discussion as one of seven recipients at the MassCPAs Women's Leadership Summit. Past AAFCPAs honorees include Janice O'Reilly (2018), Katie Belanger (2014), and Carla McCall (2013) along with AAFCPAs' alumni Tracy LeMaire (2018) and Amanda Pelcher (2023).





“Empowering others to recognize their strength, voice, and authenticity isn’t just about lifting individuals. It’s about igniting a collective flame that illuminates our shared journey. As leaders, it’s our duty to foster environments where every voice is heard, every strength is celebrated, and every authentic self is embraced. Together, we can create a ripple effect of empowerment that transforms lives and shapes a brighter future for all.”

AAFCPAs’ Managing Partner, [Carla McCall, CPA, CGMA](#), is making a positive impact on the organization and the accounting profession. Appointed Vice Chair of the Board of Directors of the American Institute of Certified Public Accountants (AICPA), she is excited to serve as a global voice of the profession, to act as a positive influence, and to be your voice. Carla was also named one of the Most Powerful Women in the Accounting Profession in 2020–2021, 2022, and 2023 by the AICPA and CPA Practice Advisor Magazine for her continual efforts to uplift the profession, empower aspiring accountants, overcome challenges and setbacks, and drive innovations in the field.





Communication & Engagement Initiatives

DEIB Teams Channel

AAFCPAs has created a space for conversation and action in Microsoft Teams. Conversations cover pressing topics that affect our diverse workforce. As of December 2023, the channel had 225 subscribers, up 15 percent from the previous year! We're proud that 69 percent of our 325+ person firm opted in and are focused on our DEIB channel.

Newsletter

Our DEIB Council issues a quarterly internal newsletter called Together, We Are Better to provide information on upcoming events, professional development, and resources that broaden our impact.



Workplace Diversity

Measuring Diversity

Diversity is so much more than race, religion, and gender. It encompasses sexual orientation, age, ability and disability, socioeconomic status, health, appearance, spirituality/religion and atheism. In 2024, the DEIB Committee aims to explore new opportunities for capturing a broader range of data as the meaning of diversity continues to evolve and expand.

The following statistics are based on self-identification in regard to race and ethnicity as part of the EEO-1 Component 1 report.

- 15% of AAFCPAs' team members are non-white
- 49% of AAFCPAs' leadership are women or minorities
- 29% of partners and 44 percent of managers are women
- 22% of AAFCPAs' new hires are non-white candidates
- 13 languages are spoken within our organization including Albanian, Arabic, English, French, German, Hindi, Mandarin Chinese, Russian, Spanish, Swedish, Swahili, Filipino, and Ukrainian



Recruiting for Diversity

AAFCPAs implemented the following processes to actively engage a broader and more diverse applicant pool.

- Post all entry-level positions through a national talent recruiting platform
- Broadened outreach to include more state schools
- Broadened college outreach to include historically black colleges and universities (HBCUs)
- Developed an internship program (E3 Intern Accelerator) at the community college level piloted with Roxbury Community College





E3 Intern Accelerator

AAFCPAs E3 Intern Accelerator Program provides opportunities for accounting undergrads who are traditionally underrepresented in the accounting industry. We worked with Roxbury Community College and welcomed our first cohort in the Spring of 2022, expanding the program in 2023 to include Mass Bay and Bunker Hill. This program provides students with paid, hands-on work experience to encourage their pursuit of a career in public accounting.





Transparency & Accountability

Transparency and accountability are crucial to our commitments to diversity, equity, inclusion, and belonging. We have implemented numerous mechanisms to uphold these values, one of which is this annual Impact Report.

Clear Expectations for Advancement

We provide team members with transparent and well-defined expectations for career advancement, ensuring everyone knows the clear path to achieve their professional goals. Our commitment to clear expectations for career growth empowers employees to set meaningful goals and navigate their career paths with confidence.

360 Degree Feedback Mechanisms

Team members have the ability to share anonymous comments or feedback at any time. In addition to our anonymous feedback process, we have added an internal feedback category where team members may recognize "inclusion", e.g., praise those who have contributed to an environment where everyone felt fairly treated, valued, respected, and connected. This recognizes team members who demonstrate a commitment to DEIB, cognizance of bias, curiosity, cultural intelligence, and collaboration.



New Peer Nominated DEIB Award

Our team members are making an impact. In 2023, a new peer-nominated DEIB Award was introduced to recognize and celebrate a team member who desires to build a work environment exemplifying DEIB through their own actions, education of others, and communication of what DEIB means within the organization. As a leader and representative who champions the ideologies of DEIB in our firm, this individual not only advances these tenants among peers but also shows clients the commitment we have to this very important initiative.

Our 2023 DEIB Award winner was Ana Rodriguez. Here's what nominators said about Ana's impact:

- Dedicated to all the traits of this award and helps other team members better understand these topics.
- A great representative of ideologies of DEIB at AAFCPAs.
- Always takes time to inform the firm.
- Has a positive attitude and a clear passion for this work.
- Very involved in our committee.
- Great ideas when it comes to being more inclusive.
- A tireless champion and raises her hand as a leader and resource.
- Shares authentically and helps others feel like they belong.
- Proactively engages in conversations that educate and illuminate key issues.
- Extremely deserving of this award



Ana Rodriguez & Carla McCall





CEO **ACT!ON** FOR DIVERSITY & INCLUSION

CEO Action for Diversity & Inclusion

AAFCPAs has pledged its ongoing commitment to advance diversity, equity, and inclusion by partnering with CEO Action, the largest business-led initiative to advance DEI in the workplace. In doing so, we joined more than 2,500 CEOs that have pledged to:

- Cultivate environments that support open dialogue on complex and often difficult conversations around diversity, equity, and inclusion.
- Implement and expand unconscious bias education and training.

“CEO Action offers a variety of tools, resources, events, and thought-leadership opportunities to support business leaders. It’s been instrumental in helping AAFCPAs advance our internal DEIB strategy. This has included opportunities to build one-on-one connections with other leaders and have candid discussions to learn from and challenge one another—there’s no limit to our capacity to learn and grow.”

— JoAnne Starks, member of AAFCPAs’ DEIB Council

Recommended Read: [Educational Quizzes: Test your knowledge by taking our quizzes to self-reflect and check your blind spots.](#)



Employee Health & Wellness

Holistic wellness within our organization is always top of mind. We recognize that, for employees to thrive, they need access to programs that delve beyond physical health to include career, financial, social, mental, and emotional well-being. Our Talent Management team offers highly competitive employee benefits and resources while continually researching new tools that could benefit team members. By ensuring access to quality benefits and compensation, our team members are empowered to prioritize their health, career, and the needs of others. In the end, this enhances our ability to serve others along with our productivity, morale, retention, organizational resilience, job satisfaction, and broader social impact.

Fitness Challenge (February through April 2023)

AAFCPAs participated in MassCPAs 6th Annual Fitness Challenge, designed to help members stay active during tax season and winter! AAFCPAs team members logged a total of 483,537 average steps.

Career Health: Career Development Support from Hire to Retire

A second career coach was brought onboard in 2023 to provide credentialed counseling and career development guidance to team members. Our career coaches work to develop a growth mindset, build career confidence, and strategically create career advancement opportunities.

Full Potential Coaching and Career Self-Reliance Training

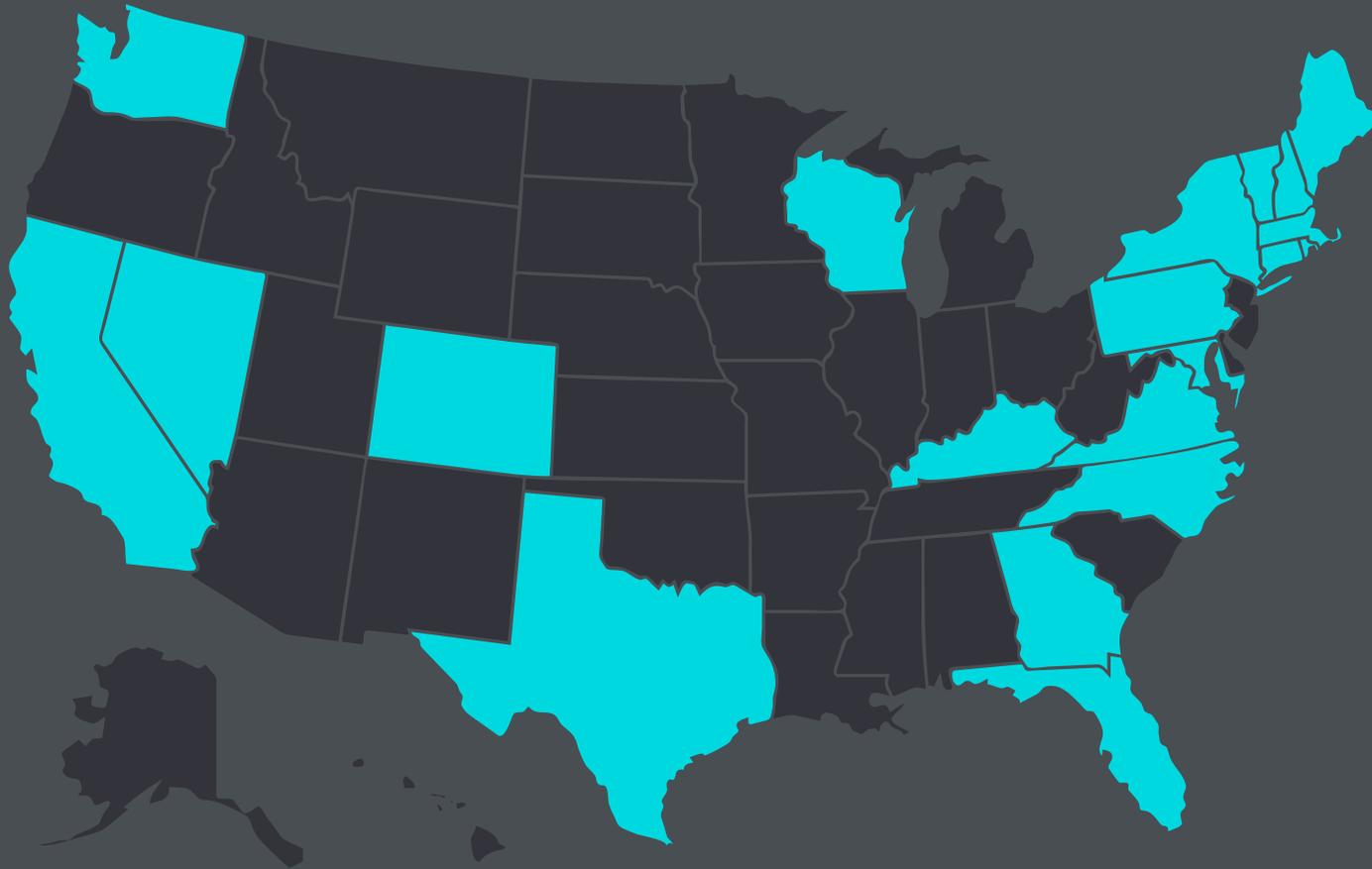
AAFCPAs provides experienced professionals with the tools to maximize their career satisfaction and potential through Full Potential Coaching and Career Self-Reliance Training. Coaches provide individualized, confidential, customized, one-on-one career support, so team members can then identify and create intentional experiences that align with what they enjoy. Employees also gain greater clarity on their current situation, uncover career patterns, and create possibilities. They have an increased sense of control, a clear sense of career direction and needs, and ongoing support for driving their career development and professional brands forward.



Professional Advancement & Development Program

Early career professionals gain access to AAFCPAs' Professional Advancement & Development Program, where they obtain insight into the essential building blocks of being a working professional in our industry. This includes career management skills such as independence, organization and time management, teamwork, and communication. Participants also gain the benefits in engagement with people across the firm to build interdepartmental relationships. Program navigators act as an additional coach and mentor for each individual while small peer groups come together to share and learn. In the end, team members are happier, more productive, and confident drivers of their own careers.





Employee Benefits & Flexibility

Our comprehensive benefits package promotes emotional, medical, and financial security. This package includes health saving and health reimbursement accounts, a 3.5 percent 401k match, and one-on-one consultations with our Wealth Management team to discuss personal financial planning.

Our Work from Anywhere model also provides our team members with the flexibility to customize how, when, and where they work. At the close of 2023, our employees worked from home offices in 21 states.

Recommended Read: [Women are among greatest flight risks under rigid return-to-office mandates.](#)



The flexibility of our team's work locations has been warmly embraced, yet the opportunity for in-person connections is indispensable in maintaining our vibrant culture and deepening our sense of belonging. Recognizing this, we hold two significant employee events annually: our Summer Outing and our Annual

Holiday Party. Not only do we cover travel expenses for team members residing out of state and their guests, but we also extend a warm invitation to plus ones for our Holiday Party. This gesture allows us to connect with and acknowledge the valuable support systems that contribute to our collective success.



Data Responsibility & Workplace Guidelines

As new technologies rapidly change the way we work, we ensure those tools are used responsibly and ethically in a nondiscriminatory way. As AI-powered tools are explored and adopted across all functional areas of the organization, we consciously assess its use as it aligns with our mission and our DEIB standards along with legal and regulatory requirements. To this end, we maintain written usage guidelines focused on privacy and data security, confidentiality, and nondiscrimination standards. Prohibitions include the use of confidential, personally identifiable, or client data in Large Language Models along with any use of AI-powered tools when making hiring, promotion, discipline, demotion, or termination decisions.

We also have an in-house team that hosts regular discussions about new tools—explaining risks, encouraging responsible use, conducting training, and ensuring employees, contractors, and authorized users are on the same page.

Information Security Safeguards

Extensive client information security provisions are in place at AAFCPAs including maintenance of a Written Information Security Program (WISP), regularly scheduled risk assessments to identify reasonably foreseeable internal and external risks to security, and implementation of information security safeguards that help prevent data breaches.

The practice of Defense in Depth further provides several different layers of protection, each working to contribute to the overall protection of information assets:

- Information integrity and access controls
- Application logic, error checking, and data validation controls
- Server and client-based logical and physical protections
- Internal and perimeter network level protections
- Employee policy, practices, and procedures
- Event and log monitoring

Upon joining the firm, all employees complete mandatory cyber security awareness training. The firm also performs proactive, internal email phishing exercises to evidence proficiency or identify additional training requirements.

Code of Professional Conduct

Because CPAs are often viewed as their clients' most trusted advisors, they are required to follow a rigorous Code of Professional Conduct, mandating they act with integrity, objectivity, due care, and competence—fully disclosing any conflicts of interest and obtaining client consent if a conflict exists. They must also maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. Each new team member learns our expectations regarding our strict adherence to this code both during orientation and in our annual ethics training.

Risk Council

Our internal Risk Council is charged with keeping all leaders accountable for managing risk in a high growth environment. This includes monitoring independence and ensuring ethical decision making. Employees are also provided the support and advice they need to act in accordance with our ethical standards and those of the profession. Our continued growth and prosperity are directly linked to our employees' ability to make decisions that are consistent with the firm's core values and ethical principles.





Looking forward into 2024, I am excited to serve as a global voice of the accounting profession—and to be your voice—through my leadership role with the American Institute of Certified Public Accountants (AICPA). My long-standing involvement with the AICPA has ensured the firm and its clients have direct insight into emerging issues influencing our profession, our employees, and the clients and communities we serve.

As we stand at the threshold of a new era, we want to share with you our vision for our future—a future that is not just about growth and success but about the responsibility, sustainability, and collective impact we can have on our world. At the heart of this vision is a commitment to elevating the value and perception of our profession, not only as accountants but as pioneers at the forefront of innovation and social change.

Innovation and transformation are the bedrocks upon which we will build this new era. By embracing continuous improvement and technological advancements, we position ourselves at the vanguard

of change. At the core of our transformation is a commitment to inclusion and opportunity. By fostering a collaborative environment that encourages diversity, equity, inclusion, and belonging, we nurture top talent and provide them with the tools and opportunities to grow. Our focus on developing a human-first culture promotes flexibility, mobility, and meaningful work, enabling entrepreneurship and intrapreneurship within our ranks. This is how we create workplaces that are not only diverse and dynamic but also inclusive and impactful.

We are committed to leading by example, advocating for these values, and integrating them into every aspect of our work. Together, we can make a lasting impact on the world around us.

We thank our employees, clients, and vendors for their dedication, passion, and willingness to embark on this journey. Together, we will shape a future that reflects our shared values of sustainability, innovation, and inclusivity.

With gratitude,

Carla McCall, AAFCPAs Managing Partner

A handwritten signature in black ink that reads "Carla McCall". The signature is written in a cursive, flowing style.



Reach out today

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