

20 IMPACT 22 REPORT

50 YEARS
OF IMPACT
1973 - 2023



AAFCPAs
great minds | great hearts



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Reporting Period
Our fiscal year runs from January 1 to December 31. Unless otherwise noted, references throughout this report cover our fiscal year 2022 (FY22). This report builds upon our inaugural 2020 Impact Report, published in April 2021, and the 2nd annual report, published in April 2022.

INTRODUCTION: A NOTE FROM OUR MANAGING PARTNER

/// 2023 marks the 50th anniversary of the founding of AAFCPAs! We have been busy reflecting on our 50 years of impact along with specific accomplishments in 2022.

AAFCPAs debuted in 1973 and has made a positive impact ever since. True to the mission of our founders, AAFCPAs remains committed to improving the economic well-being and quality of life for all constituents. This includes our employees, clients, vendors, and the communities in which we serve. Our sincerity and authenticity have become our trademark.

For the past five decades, our professionals have provided thoughtful advice and solutions to help our clients thrive. Whether it be a privately held commercial company, nonprofit organization, or a high net worth individual, our solutions have evolved alongside our clients' needs. Since our founding, we've had a special relationship with the nonprofit community, and their missions have become ours. This led to the formalization of our 10 Percent Back to Nonprofits program. This program defines the spirit of our people and the work that unites us. It is the essence of the AAFCPAs culture.

Today, our employee family includes 300+ multi-disciplinary professionals. However hundreds more accounting and finance professionals started their careers here

at the firm. We keep in touch with many of these alumni now as they serve as entrepreneurs and tax or finance leaders at companies, many of whom are now our clients. We strive to nurture a people-first culture. We remain focused on developing our people and providing opportunities for their growth. Our partners take the role of employer seriously and are very aware of the responsibility that comes with the trust our team has in us to help fulfill their professional and personal goals.

Our 50th anniversary is the perfect time to reflect not only on all the ways the firm has grown over the years but, most importantly, on the impact we have had along the way. We have some exciting things planned for the year ahead to celebrate our wonderful and unique CPA and consulting firm.

We hope you will join us in celebrating AAFCPAs' 50 Years of Impact.

With gratitude,

Carla McCall, CPA, CGMA



ABOUT AAFCPAs

AAFCPAs is the 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 wealthy individuals/estates. Since 1973, our sincere approach to business and service excellence has built a thriving 300-member firm driven by an altruistic mission to improve the economic well-being and quality of life for all our constituents. AAFCPAs donates 10% of its net profits annually to nonprofit organizations.

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

MISSION

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

CORE VALUES

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

A FIRM LED BY VALUES

AAFCPAs' leadership team sets the tone

for how our entire firm runs on a day-to-day basis. Our prevailing management philosophy is based on ethical practices and behavior. This foundation helped create long-lasting positive effects.

JOEL ARONSON CHARACTER AWARD

[Alison M. Williams, CPA, MSA](#) is the 2022 recipient of AAFCPAs' partnership-nominated [Joel Aronson Character Award](#).

This award is given annually to the AAFCPAs team member who best epitomizes the honorable character, work ethic, and client dedication of Joel Aronson, the Founder of AAF Wealth Management.

Williams was awarded the 2022 Joel Aronson Character Award at AAFCPAs' Holiday Party in December 2022. Past Recipients include (L-R) [Nichole Reilly \(2020\)](#), [Rich O'Neil \(2021\)](#), [Julius Wakaba \(2019\)](#).



L-R) [Reilly \(2020\)](#), [O'Neil \(2021\)](#), [Williams \(2022\)](#), [Aronson](#), [Wakaba \(2019\)](#)

10% BACK TO NONPROFITS

/// AAFCPAs celebrates the many nonprofits that enrich our lives by committing to donate **10% of our net income annually back to nonprofits**. As an official commitment, **10% Back to Nonprofits** started in 2015. But the culture of giving has been a part of the firm since our inception in 1973. Giving back, service, and generosity will always be part of the AAFCPAs spirit.

AAFCPAs CHARITABLE FOUNDATION

AAFCPAs sponsors its Charitable Foundation to have a positive impact on society. The Foundation supports the firm's 10% back program, including Employee Matching Gifts and our Direct-Giving programs.

DIRECT GIVING SPONSORSHIPS AND DONATIONS

AAFCPAs has a direct-giving program, which includes cash and sponsorship contributions to support nonprofits that add to the quality of life in our community. Our nonprofit clients are our primary beneficiaries.

We respond to our clients' requests to provide financial support through their capital campaigns, galas, fun run/walks, multi-year pledges, and more. Through this engagement, we become more familiar with their missions and align with their needs.

In 2022, AAFCPAs donated over \$250,000 to charitable nonprofits via our direct-giving program.



Direct Giving



Matching Gifts



Donation of Services



Staff outing fundraiser fun for all

YEAR-ROUND EMPLOYEE MATCH

AAFCPAs' year-round Employee Matching Gifts program is 2:1 (50%) to client beneficiaries, with a goal of encouraging philanthropy and magnifying employee contributions. We also have a low minimum donation amount for matching gift requests, making the program more accessible to donors of all levels.

STAFF OUTING FUNDRAISER

AAFCPAs' annual summer staff outing includes a fundraising activity to provide

entertainment and support nonprofits. In 2022, AAFCPAs team members donated money to persuade Partners to participate in a hopping horse race.

AAFCPAs' Partner Mike Pruell won the hopping horse race, earning the honor to designate this year's beneficiary, NeighborWorks® Blackstone River Valley.

Our employees contributed \$720, which was matched with \$720 from AAFCPAs' Charitable Foundation for a total donation of \$1,440 to NeighborWorks Blackstone River Valley.

"We are honored to provide our team with opportunities to engage with their philanthropic passions. Some give because they want to help others, some because it's their family or religious tradition—and some give simply because we give them this opportunity to double their impact."

/// Carla McCall, Managing Partner

GIVING TUESDAY 2022

For #GivingTuesday, AAFCPAs matches employee-directed gifts 1:1 (100%) to any charitable nonprofit for the month leading up to GivingTuesday. This enhanced match period encourages our employees to be as generous as possible to organizations that support causes for which they are passionate.

Collectively, AAFCPAs' team members and our Charitable Foundation's Employee Matching Gifts program donated over \$28,000 to mission-driven nonprofits during the 2022 #GivingTuesday drive. AAFCPAs' seven-year donation total for the #GivingTuesday movement is more than \$172,000.

TOY DRIVE FOR NURTURY EARLY EDUCATION

In addition to monetary donations, team members participated in a toy drive collecting gifts for communities in need, including educational toys for 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, including infants, toddlers, preschoolers, and their families.



AAFCPAs' 2022 Giving Tree leaves represent employee donations to charity. This tree grows in our Westborough lobby.



"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

HOLIDAY GIFT


In lieu of a physical holiday card or gift in 2022, AAFCPAs made a donation to Help Educate Assist Lives (H.E.A.L. Inc.) whose scope of services is primarily focused on orphans based in Liberia, West Africa and the youth in under-served communities locally.

H.E.A.L Inc. was recommended as this year's beneficiary by AAFCPAs' Partner Sorie Kaba, who is of Liberian descent.

In October 2022, H.E.A.L. Inc. received news from their partner that the land and campus upon which their adopted

orphanage is located in Liberia was to be sold for \$30,000. The news was devastating, as the facility is home to over 23 orphans, many of whom have already had the most harrowing of life experiences.

AAFCPAs' donation contributed to the \$30,000 needed to buy the land and campus on which the orphanage sits and stopped further displacements of innocent children who have endured more than the average adult would in their lifetime.



“When we help others, we are the ones who are fortunate. I am grateful for the support of the firm and my partners for this donation to help change the lives of these vulnerable children.”

/// Sorie Kaba, Partner

Donations of Service

BOARD SERVICE

AAFCPAs' team members contribute their financial expertise as volunteers on nonprofit boards of all sizes as a way of demonstrating our core value of community service.

In 2022, **85 nonprofit boards** received voluntary strategy, oversight, and accountability from our skilled team.

EDUCATIONAL RESOURCE

AAFCPAs clients appreciate the role we play serving as an educational resource. We provide insight and thought leadership to keep our clients up-to-date on regulatory updates, industry news, and best operational practices. We communicate timely information through regular email alerts, blog posts, and webinars that cover hot topics important to the clients we serve.

CPA DAY OF SERVICE

More than 40 of AAFCPAs' team members participated in a Day of Service in June 2022 as part of the 10th Annual CPA Day of Service, organized in collaboration with the Massachusetts Society of Certified Public Accountants (MassCPAs).

AAFCPAs volunteered as teams at the following organizations:

- Cradles to Crayons provides children from birth through age 12, experiencing homelessness or low-income situations with the essential items they need to thrive – at home, at school, and at play.
- Rosie's Place is a multi-service community center that offers LGBTQIA+ women emergency shelter, meals, and so much more.
- Massachusetts Society for the Prevention of Cruelty to Animals (MSPCA) protects animals, relieves their suffering, advances their health and welfare, prevents cruelty, and works for a just and compassionate society.
- Jookender Community Initiatives Inc. is a community organization that serves Russian-speaking Jewish families in the Greater Boston metropolitan area. Volunteers assisted with sorting and packaging donated essentials to send to Ukrainian families in need.

AAFCPAs' company-sponsored Charitable Foundation also made cash donations to the above charities to help sustain their programming.



The team volunteering at MSPCA

DIVERSITY, EQUITY, INCLUSION, AND BELONGING

/// We know there is no single formula for improving diversity, equity, inclusion, and belonging that is applicable to every company, industry, or environment. However, we believe that openly sharing

our actions in the spirit of collaboration will help our community of organizations achieve their goals faster than any organization could on its own.

AAFCPA's DEI Journey

2011

Women's Opportunity Network Established



2015

"Employee Town Hall" Dialogue on Diversity & Inclusion with Bob Rivers



2019

Managing Partners sign on with CEO Action, the largest business-led initiative to advance DEI in the workplace; employees welcomed to sign the pledge.



2018

Focus Groups Conducted by Third Party, Firm-Wide Unconscious Bias Training

2019

Formal DEI Committee Established



2022

E3 Intern Accelerator Program Launched



2021

Inaugural Impact Report Published



AAFCPAs' DEI 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.

AAFCPAs currently has learning, development, and talent advancement resources, as well as two active employee-led committees dedicated to advancing the firm's DEI Strategy:



*DE&I
Committee*



*Women's Opportunity
Network (WON)*



*Learning and
Development*



*Talent
Advancement*

DEI COMMITTEE

AAFCPAs' DEI Committee is dedicated to developing and executing on a working, sustainable strategic plan in support of our DEI Mission. We evaluate our strategic plan annually to ensure we focus resources to

best serve our employees and society.

DEI Committee Goals:

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

WOMEN'S OPPORTUNITY NETWORK (WON)

Although the primary focus of WON is to improve the growth and retention of women at AAFCPAs, this platform enhances the professional development and work-life programs for all team members at our firm.

WON Goals:

- Provide a platform for women to discuss and share insights about issues that disproportionately affect women.
- Provide tools, resources, and support for women to stay in public accounting and rise to leadership positions (if desired).
- Create opportunities for all team members at AAFCPAs to build referral networks, enhance professional development, and build confidence.
- Help team members work toward maintaining work/life balance through support, exchange of ideas and advice, and workload balance among peers.
- Work collaboratively with the DEI Committee in the education of gender bias.

Workplace Inclusion & Belonging

We hope to foster a culture that encourages collaboration, flexibility, and fairness to enable all employees to contribute to their potential and increase retention. We provide information to AAFCPAs' team members so they may better know how to take an active role in fostering workplace belonging and prevent exclusion.

2022 COURAGEOUS CONVERSATIONS LUNCH & LEARNS

Continuous learning is a core value of AAFCPAs. Continuous initiatives, rather than one-time trainings, help reduce unconscious bias and ensure AAFCPAs makes DEI an ongoing priority rather than a reaction to societal events or workplace incidents. Also, as our team members share their stories and experiences, it builds empathy and understanding. Stories connect us and allow us to share our view of the world.

AAFCPAs hosted the following sessions in 2022:

Are you greater than the Sun (January 2022)

AAFCPAs' Partner Matthew Boyle introduced the Sun Poem by Sara Ting. Sara is a long-time friend of the firm and passionate about making an enduring contribution to the elimination of all forms of prejudice, bias, and discrimination.

**Are you greater
than the sun
that shines on
everyone: Black,
Brown, Yellow,
Red, and White,
the sun does not
discriminate.**

1985 Sara Ting

Presentation of 2021 Impact Report and 2022 Goals (April 2022)

The DEI Committee hosted a Lunch & Learn to walk team members through the firm's second annual Impact Report as well as to provide awareness of the firm's 2022 goals.

Understanding Muslims (May 2022)

In this fireside chat, AAFCPAs' Managing Partner Carla M. McCall and Partner Sorie Kaba explored Sorie's earliest memories of his religion, key things to know about Muslim traditions, common biases or misunderstandings about the Muslim community, and insight into how he (Chair of AAFCPAs' DEI Committee) reconciles his religious beliefs when they may conflict with DEI goals.

Women's Roundtable Breakfast (May 2022)

WON hosted this annual roundtable breakfast post-busy season to create a safe space for women to connect, debrief, and have candid conversations about challenges, including balance.

“The WON Roundtable was a great opportunity to build relationships with women facing the same challenges as me. Women can be powerful allies at work, and I now know I’m surrounded by women who understand and support me. We discussed things that can be intimidating in a mixed group. I left feeling more confident and powerful!”

||| Amanda Hoxha,
Accountant at AAFCPAs

Imperfect, Impactful Leadership (June 2022)

WON hosted guest speaker Elise Holtzman, JD, PCC, President of The Lawyer’s Edge, who explored the double-edged sword of perfectionism along with strategies for leaving it behind. We learned how to let go of perfectionism and increase your tolerance for “failure”, so you can take risks, build resilience, and create impact for yourself, your organization, and your community.

What’s in a Name? (September 2022)

AAFCPAs’ Director of Career Development and Engagement Ingrid Goldbloom Bloch hosted this DEI Lunch & Learn to provide our team with a better understanding and appreciation for names. We explored origins of certain names, how to pronounce them correctly, and the impact having a name that is commonly mispronounced has on individuals. We educated each other on why we should be mindful of given names and asked that they take it upon themselves to learn how to pronounce them correctly, while remaining aware of the impact it has on others.

International Potluck (September 2022)

In September 2022, the DEI Committee hosted its annual International Potluck event where team members from different cultures brought food and drinks to share.



Trying new things at the International Potluck

LGBTQIA+ 101 (September 2022)

AAFCPAs hosted Rebecca Sanborn, founder and president of Sanborn Diversity Training Solutions, LLC, who introduced the terminology and culture of LGBTQIA+ communities so that we may better understand their needs and explore best practices for engaging members both as clients and colleagues.

*MassCPAs Women's Leadership Summit
(October 2022)*

AAFCPAs' Managing Partner Carla McCall served as a keynote speaker at the MassCPAs 2022 Women's Leadership Summit. WON sponsored attendance at the Summit for ten women from AAFCPAs. In this candid discussion, Carla shared her career path from staff accountant to managing partner. She reflected on the best piece of advice she received that helped her get to where she is today: be authentic and lead in a way that is innate to you. [Read the highlights.>>](#)

WON Family Outing (October 2022)

WON hosted its 4th annual apple picking event at Tougas Farm, Northborough, MA. We're all about bringing our whole selves to work, which includes our families.

*How Your AAFCPAs Colleagues from
Around the World Celebrate New Year's
(December 2022)*

Despite the Gregorian calendar being globally recognized, many countries follow different timetables. Therefore, some cultures observe New Year's on a different day. Additionally, different cultures celebrate in different ways. AAFCPAs' DEI Committee hosted this session featuring very special employee guest speakers to learn about their New Year's celebrations.



WON family outing to pick apples



/// **“The Women’s Leadership Summit was a really great day! The energy in the room was amazing and motivating. Carla’s keynote about her personal career journey was particularly inspiring, especially as a young professional. Her key point was to be who you are, not who someone else suggests you should be—and she’s kicking butt!”**

Brittany Peralta,
Senior Accountant at AAFCPAs



*Brittany
and Carla*



Strong Female Leadership

AAFCPAs Managing Partner Carla McCall is a former Board Chair of MassCPAs and currently serves on the Board and as Chair of the Audit & Finance Committees of the Association of International Certified Professional Accountants (AICPA). She received a Women to Watch Leadership Award at this event in 2013 by MassCPAs and was named one of the Most Powerful Women in the Accounting Profession in 2021 and 2022 by the AICPA and CPA Practice Advisor Magazine.

OTHER LEARNING & DEVELOPMENT TOPICS

Learning & Development

AAFCPAs links our DEI efforts with our learning and development (L&D) and career advancement strategies to leverage the power of both. Our L&D and Career Advancement teams play a key role in helping curate curriculum and resources to better support those coming into the organization, provide transparency for those expending energy navigating the workplace, and increase awareness and accountability for those learning leadership, managerial, and supervisory skills.

TypeCoach Training

AAFCPAs utilizes TypeCoach Training to coach team members on diversity of communication and work styles. Our teams are trained to develop a conscious strategy for what each member needs in terms of connection, clarity, and feedback to do their best work. We believe everyone has the capacity to do any job well. We teach people how to optimize their strengths, respect the communication and workstyle differences in others, and create strategies for working with diverse teams. TypeCoach is available in eight languages.

COMMUNICATION & ENGAGEMENT INITIATIVES

DEI Teams Channel

AAFCPAs DEI Teams Channel is designed to build a community of more DEI conscious team members. As of December 2022, we have 196 subscribers - up 14% from the previous year! This represents 68% of AAFCPAs' team members.

eNewsletter

AAFCPAs' DEI Committee issues its newsletter quarterly to all team members.

Anonymous Submission Form

The DEI committee maintains an Ask the DEI Committee anonymous submission form, so our team may voice feedback, suggestions, and concerns.

An Active Voice in the Community

- [MassCPAs Celebrates Black History Month, Recognizing Sorie Kaba, Partner, AAFCPAs](#)
- [Carla McCall is a Mentor for Bizwoman Mentoring Monday](#)
- [Carmen Grinkis, Leading Lady Making a Difference in Her Community](#)
- [Carla McCall, Most Powerful Women in Accounting 2022](#)
- [Worcester Business Journal Q&A: AAFCPAs' diversity efforts seek to create an inclusive culture](#)
- [5 Ways to Develop as an Authentic Leader](#)

Workplace Diversity

RECRUITING FOR DIVERSITY

AAFCPAs has implemented the following in an effort to create a broader and more diverse applicant pool.

- Posted 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 & universities.
- Developed an internship program (E3 Intern Accelerator) at the community college level, piloted with Roxbury Community College.

E3 Intern Accelerator

In 2022, AAFCPAs launched our pilot E3 Intern Accelerator Program, which was designed to provide opportunities for new accounting professionals who are traditionally underrepresented in the industry. We worked with Roxbury Community College, welcomed our first cohort in the Spring of 2022, and will more than double our 2023 class with more community colleges. In this program, students have the opportunity to gain paid hands-on work experience with the goal to encourage their pursuit of a CPA credential.

MEASURING DIVERSITY

The following is based on the self-identification method of identifying race and gender information as part of the required EEO-1 Component 1 report.

- 13.4% of AAFCPAs' team members are non-white.
- On average, 19-22% of annual new hires over the past five years have been non-white.
- 46% of AAFCPAs' current Leadership Team (Partners, Directors, Managers) are women. In 2011, that percentage was only 16%. 29% of Partners are female.

Traditional methods of collecting diversity statistics (i.e. EEO Reporting) do not adequately represent the current definition of diversity (i.e., ethnic, sexual orientation, gender, income, thought, etc.). In 2023 the DEI Committee hopes to broaden our team's ability to anonymously and optionally share meaningful data as the definition of diversity continues to evolve.



AAFCPAs introduces E3 Program to Roxbury Community College students



ACCOUNTABILITY

Annual Survey (Outcome Evaluation)

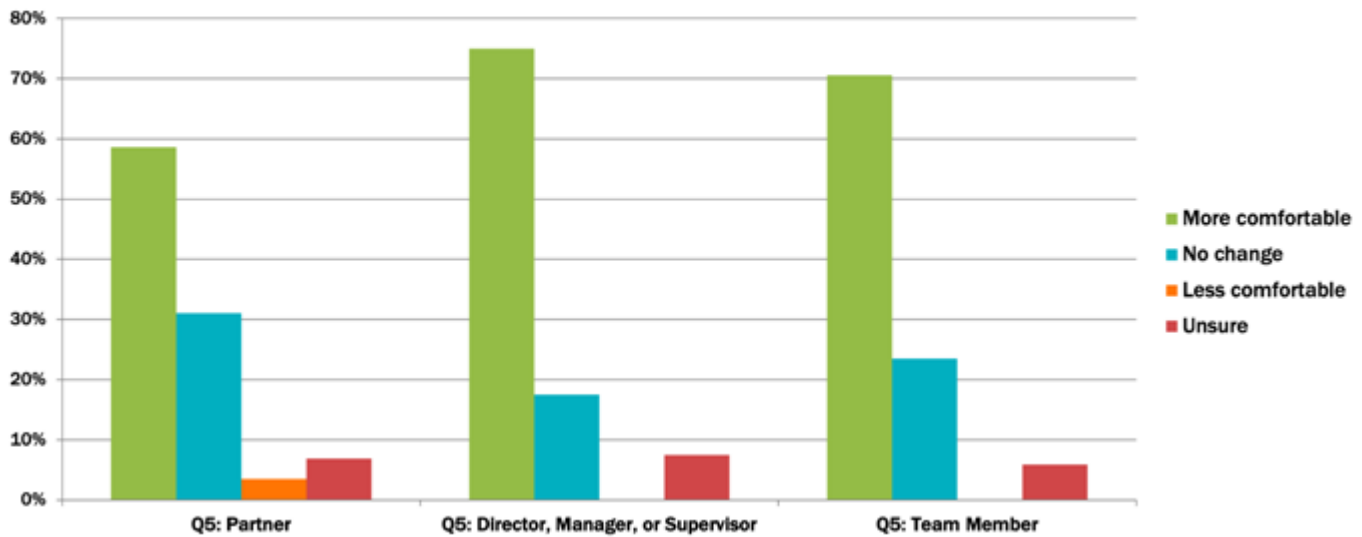
AAFCPAs' DEI Committee conducts an annual employee survey designed to gauge awareness of the firm's initiatives and to learn how best to meet our team's DEI expectations. The survey helps ensure we are dedicating resources to the most appropriate objectives and actions to best serve our employees and society.

Highlights from the 2022 Survey

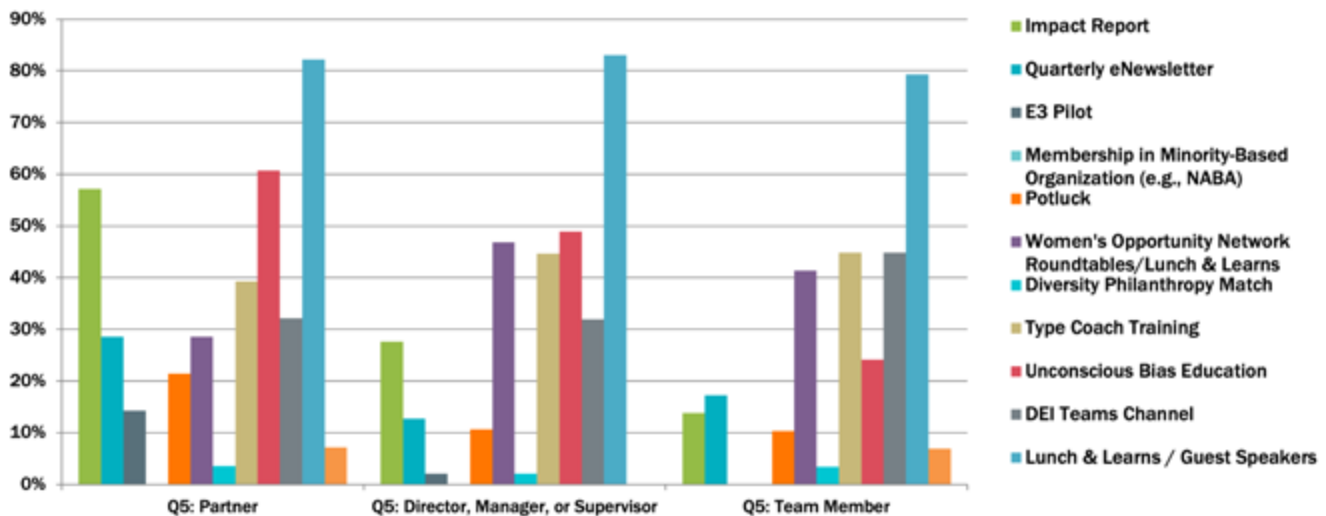
- 115 responses were collected.
- Lunch & Learns, Unconscious Bias training, and other learning & development topics were ranked as the most valuable DEI effort.

- For employees with a tenure over one year, 69% reported an increase in their level of comfort having DEI-related conversations with colleagues. 74% reported an increased perception in how AAFCPAs values the difference of individuals.
- For employees with a tenure less than one year, on a scale of 1 – 100, responses averaged 93 when asked: To what extent does AAFCPAs value the difference of individuals?

Over the past year, how has your comfort level changed having diversity, equity and inclusion (DEI) related conversations with your colleagues?



If you have been engaged with the firm's DEI efforts, what has been most valuable to you? Please check all that apply.



AAFCPAs' DEI Committee will take insight from the survey to compare against 2021 results, to improve data gathering with learnings, and to plan for the future. We recognize that Diversity, Equity, and Inclusion is not a revolution but an evolution, and we commit to continue to move the needle in a positive direction.

CEO Action

Since 2019, AAFCPAs' Leadership pledged their ongoing commitment to advance diversity, equity, and inclusion by signing on with CEO Action, a national initiative to act on supporting a more inclusive workplace. This includes documenting and executing on a specific set of actions to cultivate a trusting environment where all ideas are welcomed and employees feel comfortable and empowered to discuss DE&I. Team members were also invited to sign the I ACT ON Pledge.



EMPLOYEE HEALTH AND WELLNESS

At AAFCPAs, the wellness of our team is always top of mind. We recognize that for employees to thrive, we must offer programs that go beyond physical health. Other critical elements of well-being include career, financial, social, mental, and emotional health. Our Talent Management team remains focused on offering the best employee benefits and resources available, and we continue to think creatively about providing tools that go beyond physical health.

The Importance of Self Care (Feb 2022)

AAFCPAs' Women's Opportunity Network (WON) hosted guest speaker Soni Masur, a Reiki Specialist, to discuss the importance of self-care. Soni guided us through meditation and provided tools to help us manage stress, anxiety, and clear the mind.

Self-Care Olympics (Valentine's Day to Tax Day)

WON launched this initiative to empower employees to create some long-lasting self-care routines or habits that they'll continue with as part of everyday life long after the challenge! Each week, from Valentine's Day through Tax Day, 4/15, participants were encouraged to post a picture or comment of their self-care in our Teams Channel. Winners were selected each week, and the WON committee awarded and rewarded bronze, silver, and gold medal winners at the end of the challenge!



Recommended read!

"In an AICPA Keynote, Nataly Kogan talked about Emotional Fitness as a leadership skill. This really resonated with me because every day brings different emotions and feelings depending on what's going on in our lives. I was so moved by her talk and concepts that I came back and shared the key points with the firm. I reminded our employees of our commitment to self-care, and to put time in their calendars to practice self-care, which can be different each day based on how you're feeling that day and what you need."

/// Carla McCall, Managing Partner

Fitness Challenge (February to April)

AAFCPAs participated in MassCPAs 6th annual Fitness Challenge, designed to help members stay active during tax season and winter! AAFCPA's team averaged a total of 483,537 steps.

CAREER HEALTH: CAREER DEVELOPMENT SUPPORT FROM HIRE TO RETIRE

In 2019, AAFCPAs hired its Director, Career Development and Engagement Ingrid Goldbloom Bloch. Ingrid is a credentialed counseling and career development professional who helps our people develop a growth mindset, build career confidence, and strategically create career advancement opportunities.

FULL POTENTIAL COACHING AND CAREER SELF-RELIANCE TRAINING

AAFCPAs' Experienced Professionals maximize their career satisfaction and potential through Full Potential Coaching (FPC) and Career Self-Reliance Training. Ingrid provides individualized, confidential, customized, 1-1 career support. We help our team identify and create intentional experiences that align with what they enjoy. They gain clarity on their current situation, uncover career patterns, create possibility, and learn how to use design thinking to Level-Up. They have an increased sense of control, a clear sense of career direction and needs, and ongoing support for executing their career development and professional brand plans.

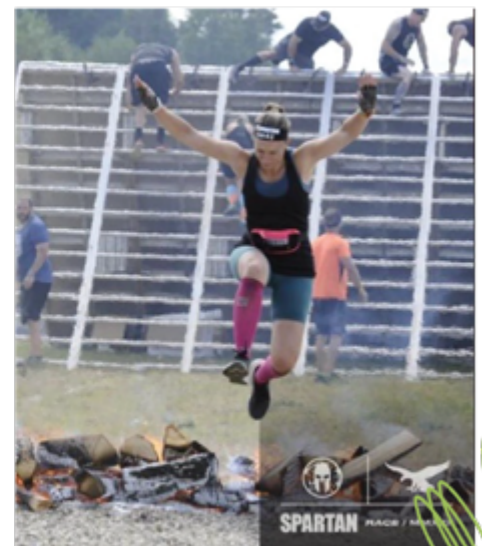
We empower our people to proactively manage their careers, identify intentional opportunities, and have courageous conversations.

Explore Ingrid's 2022 Insight on LinkedIn Pulse

- [Are You Your Own Toxic Boss?](#)
- [What Do You Need to Do Your Best Work?](#)

"I signed up for a very challenging obstacle race with a group from my gym. It all started with focusing on a solid self-care routine - signing up for a race to make sure I stuck to working out through the busy times at work. Along the way, it became so much more. The teamwork and the sense of community I felt with my team was awesome! I worked hard to accomplish this goal, and I have so much gratitude for those who supported me and cheered me on along the way!"

/// Katie Belanger, Chair of WON



PROFESSIONAL ADVANCEMENT & DEVELOPMENT (PAD) PROGRAM

AAFCPAs' PAD Program is designed for early career professionals. We provide insight into the essential building blocks of being a working professional in our industry, which includes career management skills related to independence, organization and time management, teamwork, and communication. The program engages with people across the firm to build interdepartmental relationships. Each early career professional is paired with a PAD Navigator who acts as an additional coach and mentor. Individuals are also paired with a small group of peers, so they may learn together.

Our goal is to help team members be happy, productive, and the drivers of their careers.

Employee Benefits and Flexibility

AAFCPAs puts a premium on our employee's comfort as they pursue excellence. We offer a comprehensive benefits package that includes health saving accounts and health reimbursement accounts, a generous 3.5% 401k match, and one-on-one opportunities with our AAF Wealth Management team. Our Work from Anywhere model, launched in 2021, allows our team members the flexibility to customize how, when, and where they work.

[Learn more about what is unique and awesome about working at AAFCPAs.>>](#)



DATA RESPONSIBILITY

INFORMATION SECURITY SAFEGUARDS

AAFCPAs employs extensive client information security provisions, 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” is utilized at AAFCPAs, providing 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
- Monitoring of events and logs

All employees upon joining the firm are required to complete a Cyber Security Awareness training curriculum. The firm performs proactive email phishing exercises against the employee population to evidence proficiency or identify additional training requirements.

CODE OF PROFESSIONAL CONDUCT

AAFCPAs' continued growth, profitability,

and prosperity are linked to our employees' ability to make decisions that are consistent with the firm's core values and ethical principles. AAFCPAs' has a risk committee charged with keeping all leaders accountable to managing risk in a high growth environment, which includes monitoring independence and ethical decision making. We are dedicated to giving employees the support and advice they need to act according to our standards and the CPAs profession's ethical principles.

CPAs are often viewed as clients' most trusted advisors. Thus, members of the firm are required to follow a rigorous Code of Professional Conduct, which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing services.

The firm's expectations regarding strict adherence to this code of professional conduct are communicated as part of each new team member's orientation and in our annual Ethics training.

AAFCPAs' [Jeffrey Mead, CPA, CGMA](#) and [Olga Yasinnik, MBA, CPA](#) presented their ethics guidance to the CFO community as part of the annual Ethics training at FEI-Boston. The 2022 Ethic Symposium theme focused on Building Ethical Management and Culture in Challenging Times. Jeff and Olga explored the effects of both crisis and burnout on ethical decision-making.

LOOKING FORWARD

/// *“Impact is holistic. It is not one thing. Impact is a culmination of actions and results, over time, in a consistent manner,” says Carla McCall, AAFCPAs’ Managing Partner. “We commit to holding ourselves accountable by publishing this annual report while humbly striving to do better, so we may continuously amplify our impact.”*

As we embark on our next 50 years, AAFCPAs will continue to dig deeper into examining how our actions and decisions affect individuals, communities, and the environment.

We plan to continue our organic growth journey to sustain and create additional jobs that boost the economy, which has a positive social and economic impact. We will continue to provide exceptional value solutions to our clients in support of their efforts to do the same.

We will continue to prioritize building strong relationships with clients and adapting services to meet their changing circumstances.

We will continue to cultivate our people-first culture and prioritize the employee

experience and their well-being. Our culture non-negotiables, such as People over Profit, will continue to drive leadership behaviors. Recognition will remain a cornerstone of our employee-first strategy along with our culture of gratitude, which values the unique strengths and contributions of each team member.

Our team members will continue to feel a genuine sense of being cared about and to feel they are positively learning, advancing, and contributing in meaningful ways. AAFCPAs’ team members will continue to create their own career development path through intentional experiences. We remain focused on increasing efficiency with automation and innovation—and on training our professionals to be advisors rather than mere practitioners. We are committed to working smarter.

We will continue to foster a culture of active listening, continuous improvement, and collaboration so that we may gain a deeper understanding of economic, social, environmental, and cultural issues. This, in turn, will ensure we are always improving in our role as an employer, as advisors, and as members of humanity.

By continuing to assess our holistic impact, we aim to make more informed and sustainable choices that consider the well-being of our stakeholders: team members, clients, vendors, and communities.

REACH OUT TODAY:

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