



Integrated Report

2024

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The Forvis Mazars Way in Action

Welcome Message

What an exhilarating year it has been! Fiscal year 2024 marked a period of growth and opportunity for our people, clients, and communities.

In November 2023, we took a bold step toward shaping the future of our firm with the announcement of the formation of a global network, Forvis Mazars, as of June 1, 2024. This global network operates under a common worldwide brand and allows us to expand our international reach and capabilities. This will allow us to provide seamless and agile services for our clients while building remarkable career opportunities for our people.

This Integrated Report illustrates how we bring our forward-thinking vision to life through our culture, controls, and environment. As you read the report, you will recognize a recurring theme throughout

each section. Whether we are delivering an **Unmatched Client Experience**[®], being thought leaders in the industries we serve, giving back to our communities, or fostering an environment where our people can thrive, Forvis Mazars is dedicated to unlocking potential nationally and on a global scale.

The strong culture of our firm underpins everything we do, and this report is structured to reflect that culture, which we refer to as The Forvis Mazars Way.

We are thrilled to share how Forvis Mazars will make tomorrow better than today.



Tom Watson
CEO

A handwritten signature of Tom Watson in black ink.



Matt Snow
Governing Board Chairman

A handwritten signature of Matt Snow in black ink.

We Are Forvis Mazars

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
Excel Always**

**Be Builders
Operate as One Firm
Lead With Integrity
Deliver an Unmatched Client Experience**



Global Presence

\$5bn+

Combined Revenue (2023)

100+

Combined Countries, Territories, & Markets

400+

Combined Offices & Locations

1,800+

Combined Partners

40,000+

Combined Team Members

The Story of Forvis Mazars Making History Together

We ushered in an exciting era for Forvis Mazars, as we launched our new global network.

With a legacy spanning more than 100 years, Forvis Mazars is committed to providing a different perspective and an Unmatched Client Experience (UCX) that feels right, personal, and natural. As a global network, we are proud to embody the same ethos as a local team. Forvis Mazars is uniquely built for our people, clients, and communities.

The establishment of Forvis Mazars, effective June 1, 2024, marks a significant new chapter for our firm, focused on the future. The legacy firms of Forvis Mazars have worked together for more than two decades, fostering deep respect and trust among us. These

strong individual relationships are what served as the catalyst for discussions about creating a new network to address key strategic goals, including enhancing our presence both in the U.S. and internationally.

By forming this network, we created something greater together than we could have done individually. Together we will serve our clients even better, can win more clients, and will attract even more talent to sustain future growth. With the creation of Forvis Mazars, we are proud to welcome more than 1,000 new teammates in the U.S. bringing extensive experience and excellence in client service.

U.S. Presence

\$2bn+
Combined Revenue*

76
Markets

29
States

600+
Partners & Principals

7,000+
Team Members

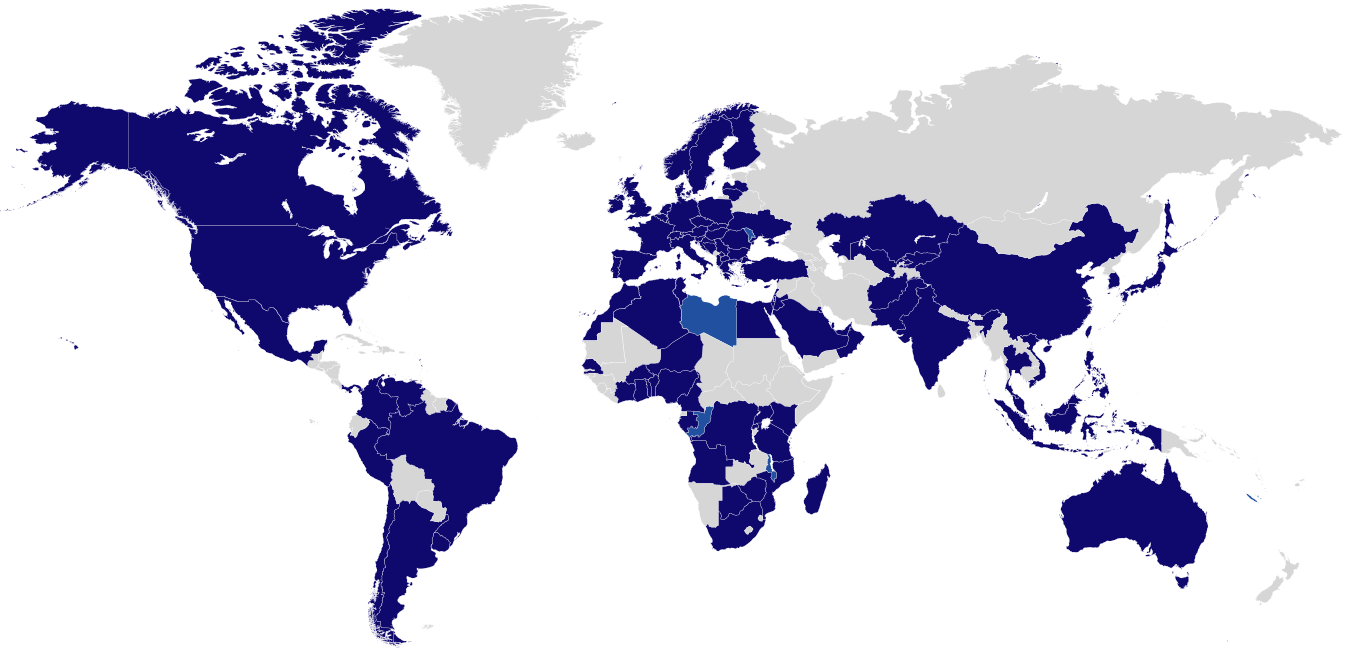
*2023 Combined Revenues: FORVIS \$1.7bn, Mazars USA \$305m.

The Story of Forvis Mazars Making History Together

As Forvis Mazars, our core DNA, purpose, values, and the UCX standards that have always been our foundation carry on, maintaining a strong focus on our people and clients.

Our new global network unlocks many opportunities to expand our footprint in cities across the U.S. and serve clients with global needs, enabling us to tap into new markets, industries, and geographies, while also creating a wealth of outstanding career opportunities for our people.

Having a new global brand is essential for our long-term success, and we are thrilled about the possibilities that are ahead. The future is indeed bright.



- Forvis Mazars
- Correspondents of Forvis Mazars Clients





UNMATCHED CLIENT
EXPERIENCE

1



Listen to
understand

2



Be
responsive

3



Consult with
purpose to
deliver value

The Forvis Mazars Way

Our DNA

The Forvis Mazars Way serves as the cornerstone of our legacy—our DNA—shaping how we approach each day to make a meaningful impact for those we serve.

Our DNA

We exemplify Be Bold values and deliver an Unmatched Client Experience. These unique attributes differentiate us in the marketplace, enabling us to attract and retain top talent while inspiring us to serve our clients and communities effectively.

Along with our commitment to an Unmatched Client Experience, our DNA—our purpose, mission, vision, and Be Bold values—defines who we are as Forvis Mazars.

Our Network

Our network was built on a vision to provide seamless and agile client service, while creating engaging opportunities for our people to grow and excel. This DNA is woven into daily interactions as we commit to being bold, empowering each other, our clients, and our communities to reach their full potential.

Our People

This year we embarked on a new journey together as Forvis Mazars, rooted in decades of trust, shared vision, and close collaboration. From onboarding to performance evaluations, our team members consistently uphold these enduring standards.

Our Be Bold values and UCX standards are introduced to new hires as we integrate them into our exceptional culture. These principles are further reinforced in manager and director training sessions.

Furthermore, our leaders consistently hold themselves accountable to these standards through our “Key Assessment” performance evaluation processes and KPIs. We celebrate both our values and our achievements. With our BRAVO! recognition program, team members actively seek opportunities to recognize how their colleagues’ contributions exemplify our Be Bold values.

Our Clients

At the core of our mission lies an uncommon commitment to excellence. UCX is our approach to delivering exceptional value and quality that not only meets but exceeds our clients’ expectations. Central to this commitment is our Client Experience (CX) Council, a critical pillar dedicated to upholding these high standards. The diverse group, comprised of 15 individuals from different geographies, service lines, and levels of the firm, is responsible for driving a client-centric culture at Forvis Mazars, helping ensure our clients’ unique needs and perspectives are heard and acknowledged in every interaction.

Our impressive Net Promoter Score (NPS) of 80 is a testament to our commitment to excellence in how we serve our clients, significantly surpassing the industry average. We continually seek new avenues for client engagement from insightful surveys, aimed at showcasing who we are, to demonstrating our values in action.

Our Be Bold values inspire us to excel always and lead with integrity to make wise business decisions. We remain committed to upholding high standards while delivering innovative services that provide our clients with the clarity and confidence to unlock their full potential.

Integrity First Quality & Risk

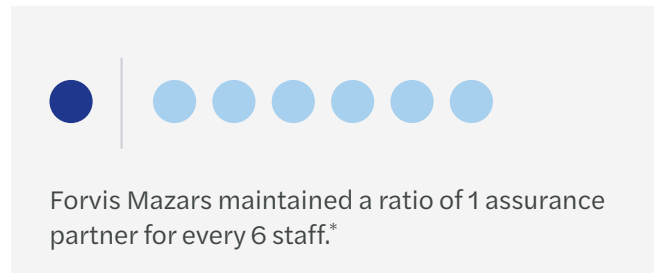


We fulfill our uncommon commitment to excellence by maintaining the highest standards for quality and compliance in our work.

Two of our Be Bold values—excel always and lead with integrity—challenge us to not only strive to meet but exceed the standards of excellence our profession expects. Doing so is essential to providing an Unmatched Client Experience and helping us maintain a position of trust and value for those we serve.

Forvis Mazars is dedicated to upholding the highest standards of quality, with the goal of better serving investors and safeguarding the public interest. With a strong focus on integrity, our professionals understand the responsibility they have to those who depend on our work. Establishing quality expectations and standards is fundamental to the firm. The tone for this important value is clearly set from the top, but all professionals know that they are responsible for setting the tone for high quality in their daily interactions. Our Be Bold values guide our leaders and team members to make wise and sound business decisions that set the standard for our profession.

The 2024 Quality Report narrates the framework of our assurance practice’s quality structure and outlines our commitment to making quality a core element of our mission.



*As of November 30, 2023, Forvis Mazars Quality Report.

Memberships & Regulators

In addition to our careful consideration of client engagements, technical commitment, culture of continual learning and innovation, and focus on compliance with all applicable auditing standards, we maintain high professional practice standards. Registrations and memberships include:

- PCAOB Registration
- AICPA Center for Audit Quality
- AICPA Employee Benefit Plan Audit Quality Center
- AICPA Governmental Audit Quality Center
- AICPA Private Companies Practice Section

Risk Management

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

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. At Forvis Mazars, “integrity trumps economics, every time.”

Potential Client Considerations

- Nature of & purpose for the services being performed
- Demographics (structure, team capabilities, etc.)
- Tax & regulatory history, including planning
- Economics, including industry & general performance
- Operations (life cycle, fraud, nature of product/services)
- Quality of financial records, internal control
- Related parties, turnover, conflicts of interest
- Litigation history, both as a defendant & plaintiff
- Unique consideration of industry, nature of the entity (such as a benefit plan), or nature of the service Forvis Mazars would provide

As we look ahead, our risk management approach focuses on responding to and anticipating emerging risks within the global risk landscape. Even as we unlock the potential of our new global network, we remain committed to long-standing risk management principles. We are particularly attentive to new emerging technologies, such as generative AI and large language models. In addition, we continue to monitor regulatory developments—including heightened requirements for quality management systems and additional regulatory proposals with widespread implications. This vigilance extends to staying current on evolving data security requirements, proposed tax legislation, and developments in professional standards. It also includes responding to feedback from our regulators, peer reviewers, and inspection teams, and making improvements where needed to maintain our standards of quality.

Read our [2024 Quality Report](#)

Growth & Performance

We are pleased to share our continued growth over the past year. These successes are not mere coincidences; they stem from Forvis Mazars' proactive approach to client service and commitment to quality and high professional standards, leading to sustainable success in FY 2024. Discover our progress and how we've accomplished more together.

Organic Growth

Growth is essential for any organization that wants to thrive, but at Forvis Mazars, we pursue growth not for its own sake. By delivering an Unmatched Client Experience, we create many opportunities for our team members and clients to flourish.

In FY 2024, the firm achieved revenue of \$2.2 billion, reflecting a robust growth rate of 8.6%. Every service line experienced revenue increases with Assurance growing by 12.2%, Tax by 11.9%, and Consulting by 3.8%. This performance builds on the previous year's success, which recorded a 12.9% growth rate. Such consistency underscores our commitment to sustainable and organic growth.

12.2%

Assurance

3.8%

Consulting

11.9%

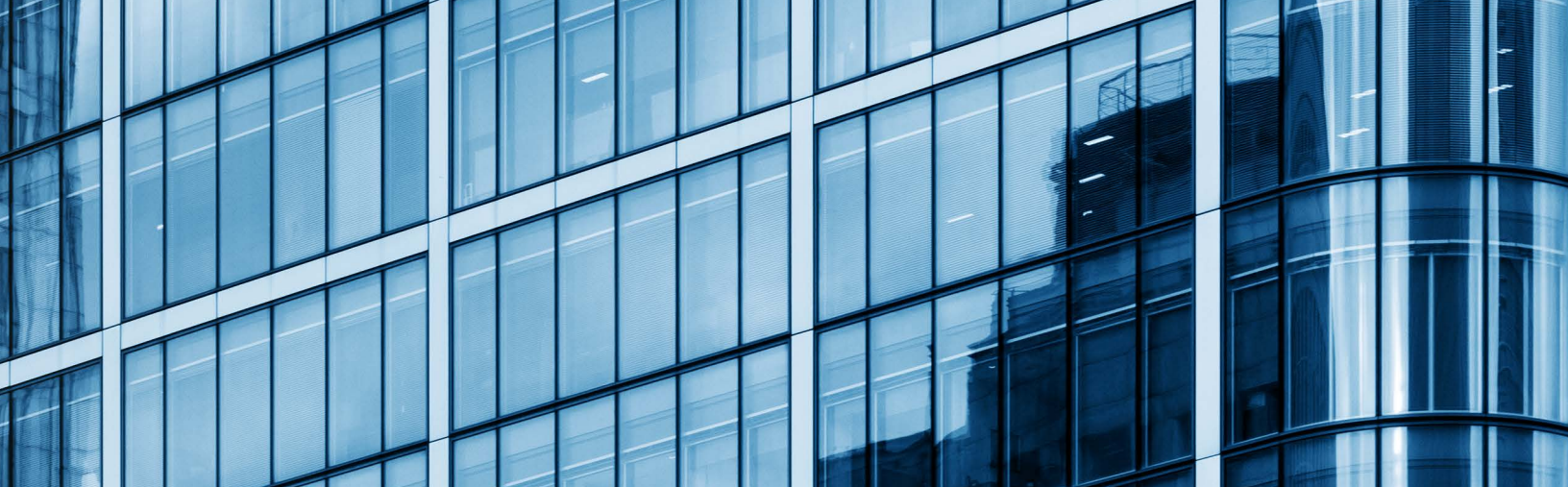
Tax

8.6%

Overall Firm Growth

Growth was prevalent across each of the firm's designated industries, as listed below:

- Commercial Products Practice
- Construction & Real Estate Practice
- Dealerships Practice
- Education Practice
- Financial Services Practice
- Forvis Mazars Private Client
- Healthcare Practice
- Insurance Practice
- Nonprofit Practice
- Private Equity Practice
- Public Sector Practice
- Technology & Services Practice



Growth Investment Fund

Our Growth Investment Fund (GIF), approved by our Governing Board in June 2022, is designed to support transformative growth initiatives that aim to make tomorrow better than today.

Our leaders and partners prioritize building an entrepreneurial spirit and investing in the future. Our GIF helps accelerate our growth potential by sharing some of the financial risks of bold investments while capitalizing on our innate desire to grow wisely. Each year, we report the outcomes of our investment activities to our Governing Board, partners, and managing directors, showcasing how this innovative program drives profitable growth and helps ensure our firm remains relevant for future generations.

In the past year, some of the top GIF priorities included investments in several areas to help propel growth:

- Launching our Washington National Tax Office
- Building out our Real Estate Tax, and Assurance practices
- Supporting the establishment of a NetSuite Technology Consulting practice
- Growing our middle-market value creation consulting service line
- Introducing an innovative new healthcare consulting service
- Expanding our Consulting practice serving large public and private clients

Since the GIF's inception, by the numbers:

12

new transformative growth strategies

\$75m+

aggregate multiyear investment, which truly equals \$150 million of the firm's capital at work when combining the co-investments for these transformative GIFs initiated directly by the managing partners of our geographies and services lines

75

new partners, managing directors, and directors currently supported by the GIF

We encourage all team members to Be Bold in sharing their transformative growth ideas. Some of our best ideas come from those who understand the dynamic market we operate in and identify opportunities for Forvis Mazars as we collaboratively build a better future.

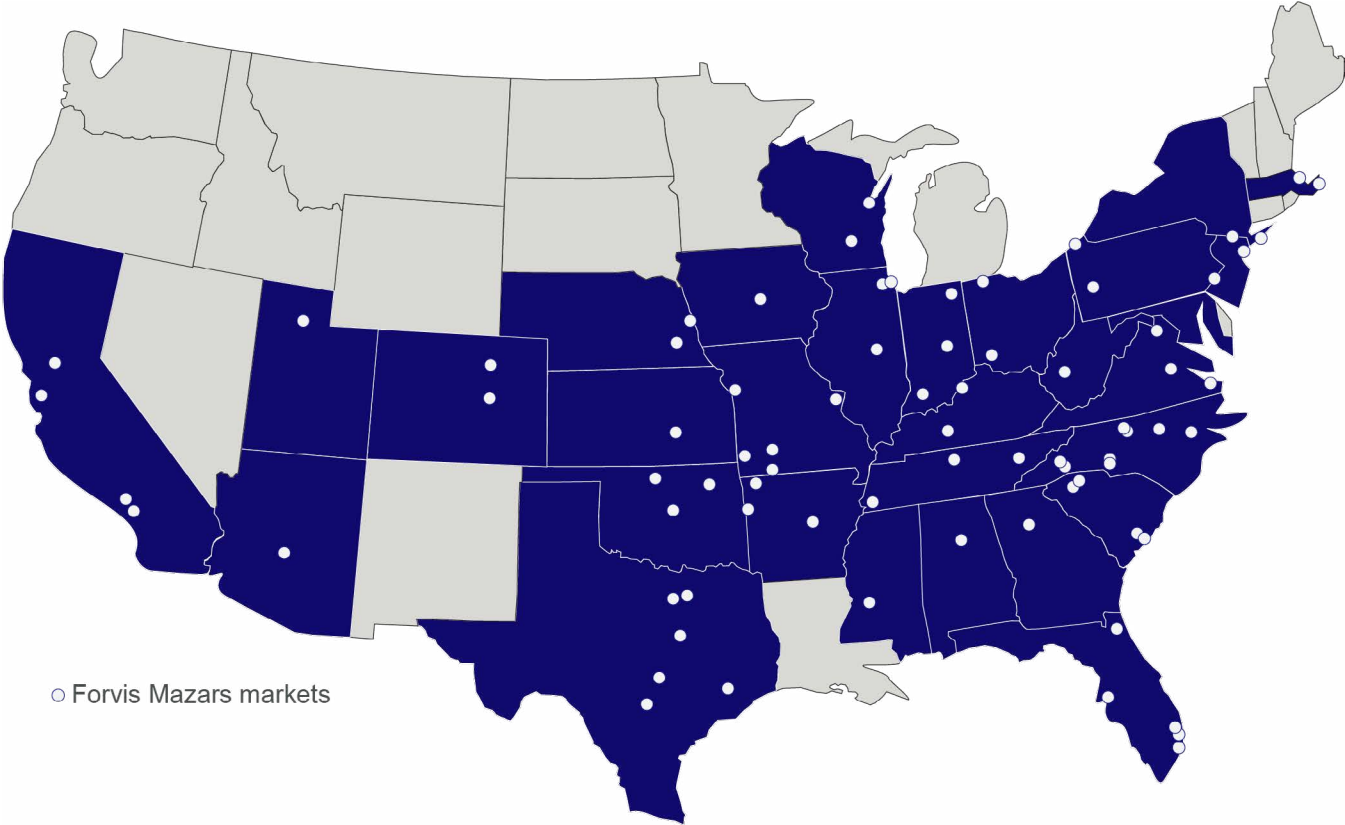
Growth & Performance

Market Expansion

Reflecting on our history, we see numerous instances where our firm boldly established a presence in new cities with substantial long-term growth potential. Notable markets such as Nashville, Tampa, and Louisville have demonstrated their value as rewarding locations for building new teams and serving both existing and future clients. Our initiative to tap into the South Florida market, launched in June 2022, has yielded tremendous success, resulting in a dedicated and talented team in the region.

Our expansion efforts have not halted there. Last year, we added an office in Northern California, enhancing our footprint on the West Coast with our second market in the state. In addition, we have strengthened our U.S. presence with new markets in Boston, New Jersey, and Philadelphia and an expanded presence in New York City, Chicago, Dallas, and Los Angeles.

The firm also strengthened its ability to serve public sector clients by acquiring Thales Consulting, a software technology and consulting company focusing in state and local government financial reporting services. The company developed The Reporting Solution, a software as a service platform that helps streamline the preparation of financial reports through collaboration and efficient reporting processes. Forvis Mazars has been a certified implementer of this tool since 2020. The firm is already witnessing early signs of organic growth from the acquisition, by adding new clients or expanding services with existing clients.



¹Services outside the United States are provided through our subsidiaries and/or affiliates.



Newest Class of Forvis Mazars Partners, June 18, 2024.

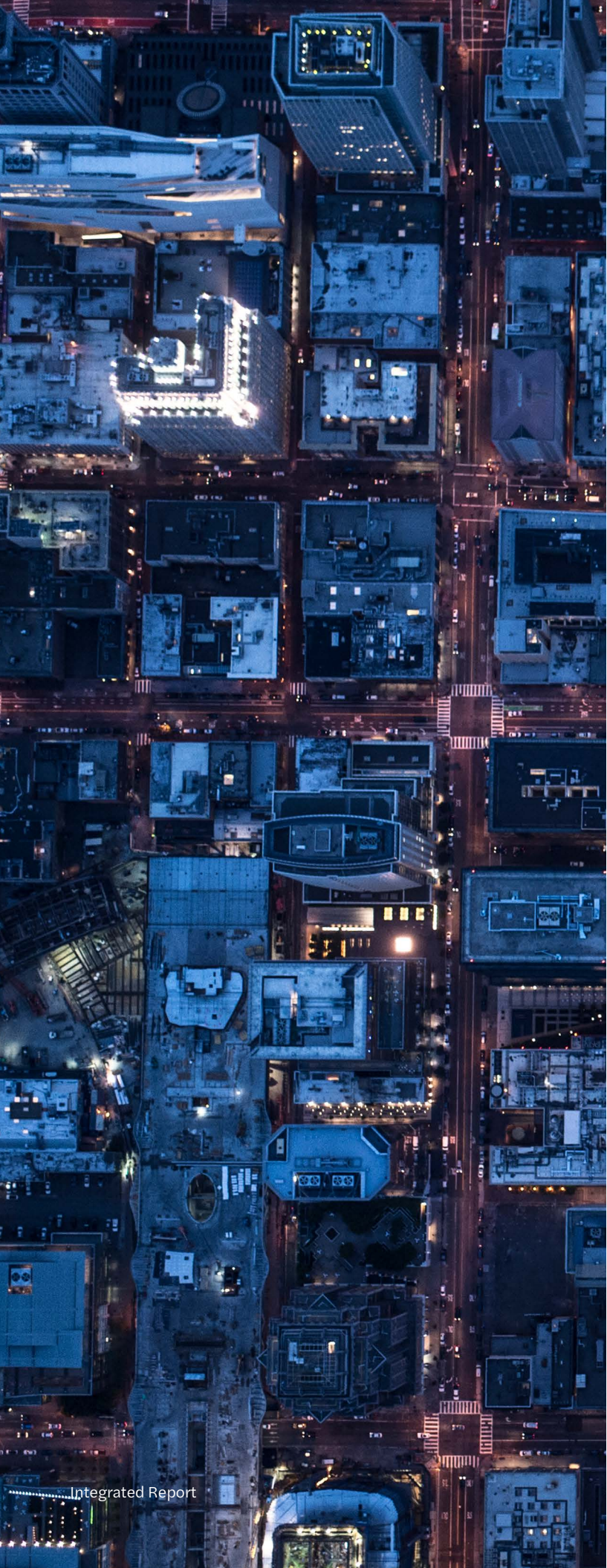


New Managing Directors, June 18, 2024.

Our Commitment to the Partnership Model

Forvis Mazars is proud to be committed to the partnership model and the benefits that it provides to our clients, partners, and team members. While some firms have chosen to pursue different ownership structures, we believe our structure enables us to invest for both the short- and long-term needs of the firm, even if those investments may not return dividends for years to come. Our strong financial position and wise business practices give us the

confidence and ability to make the investments necessary to thrive well into the future. We are able to make the decisions that are right for our firm, our people, and our clients. And, as leaders and stewards of our firm, we are able to achieve our goal of “making tomorrow better than today” and pass on opportunities to the next generation that are even better than partners from prior generations left for us.



Forward Vision To Deliver Innovative Solutions

To excel always is to go beyond what is expected and develop forward-looking solutions.

We actively seek ways to execute our forward thinking and unleash our creative potential. This includes introducing technology-driven products for our clients and equipping our staff with essential tools. Our approach to purposeful consulting prioritizes our clients' challenges and listens to their feedback.

Through EUREKA!, our firm's ideation platform, firmwide Innovation Tournaments, and EDGE—The Innovation Lab of Forvis Mazars—we aim to position ourselves as a firm of the future. We strive to enhance both the solutions we offer to clients and the professional capabilities of our client-serving professionals by fostering a culture of innovation. These are some innovation success stories from the past year:

TaxCred PRO™

One of our newest products is TaxCred PRO™ for Clean Energy, a tool that assists our clients in identifying opportunities for tax credits and deductions under the *Inflation Reduction Act of 2022* (IRA) related to clean energy initiatives, such as solar and wind, construction and renovation, and energy production—opportunities that may not be immediately evident.

LoanPricing PRO®

LoanPricing PRO®—our strategic loan pricing tool for commercial lenders—was created to help financial institutions manage and grow their portfolios by factoring in the value of existing customer relationships and enhancing proposed loan terms with real-time profitability analysis.

EDGE

Our innovation team—EDGE—seeks to research, understand, and monitor emerging disruptive technology to determine its potential impacts on our clients. In March 2023, EDGE created the Generative AI Task Force, and in February 2024, we held a summit with senior leadership to develop a phased approach to how we will leverage AI to better serve our clients.

Innovation is the heartbeat of progress. Forvis Mazars and our legacy firms have embarked on an innovation journey for many years—one that we will continue to embrace in the years to come. We invite you to join us and share your ideas as part of this exciting endeavor. Together, we will create a future that is brighter and bolder.

Visit our [Innovation webpage](#) to learn more



Inclusion & Sustainability



We strive to create an environment where everyone can thrive and feel a sense of belonging. We believe that bringing our best selves to work is made possible by promoting an inviting and safe atmosphere for all.

Our dedication to philanthropic work and giving back to our communities, along with our efforts to empower our people, emphasizes our intentional approach to cultivating a respectful and vibrant environment in everything we do.

Inclusion and sustainability (I&S) at Forvis Mazars focuses on enhancing the experiences of our people and the communities we serve. FY 2024 marked a significant milestone as we intensified our commitment to inclusion and diversity, internal ESG assessment, philanthropy, supplier diversity, and accessibility initiatives across the firm. Key highlights from last year include new initiatives in philanthropy, community impact, and our people.

Philanthropy

Forvis Mazars is dedicated to helping the communities we serve unlock their full potential. One of the ways we demonstrate this commitment is through generous contributions of time and resources. The Forvis Mazars Foundation provides philanthropic support to these communities creating opportunities for our people, including over 500 Ambassadors from our retired partners Alumni Network, to actively put our mission into action.

In FY 2024, the Forvis Mazars Foundation donated more than \$1.78 million in charitable funds to our communities with three primary pillars of giving, centered on supporting 501(c)(3) organizations that are dedicated to the following:



Combating hunger & achieving food security for all



Promoting good health & well-being



Ensuring an equal opportunity for all students to access quality education

We take pride in highlighting employee giving. Last November, we launched FORgood, our community engagement program designed to foster connections, collaboration, and involvement within our communities. This platform helps us aggregate funds donated by our team members and track community volunteer hours for reporting to clients and stakeholders.

With IMPACT Days inspiring our people to collectively volunteer and donate to charities together during one week, 1,875 team members across 55 offices made an impact for good in our communities through more than 100 organized volunteer events and 7,600 volunteer hours.

Community Impact

Alongside providing time and resources to support communities, we also collaborate with national organizations to strengthen our relationships and make a meaningful impact on the profession. We have increased our presence and deepened our external collaborations at industry-related conferences that focus on diverse communities, including:

- **NABA** – National Association of Black Accountants
- **ALPFA** – Association of Latino Professionals for America
- **Disability:IN** – a leading nonprofit for business disability inclusion worldwide
- **ASCEND** – an organization dedicated to developing, supporting, and empowering Pan-Asians throughout their careers
- **Out & Equal** – the premier nonprofit organization working exclusively on LGBTQ+ workplace equity, inclusion, and belonging

Inclusion & Sustainability



Community Impact (cont.)

We achieved representation at the AICPA & CIMA National Commission on Diversity & Inclusion (NCDI). This seat gives us the chance to work with other top firms to have a voice and impact education by working together for the good of the profession.

As we look ahead, it is critical for us to take inclusion, diversity, and corporate social responsibility initiatives to the next level. In November 2023, we formed the Forvis Mazars Executive Impact Council, a diverse set of forward-thinking individuals focused on helping the firm excel in the areas of I&S. Since then, this group has hit the ground running and is working to see possibilities and deliver innovative solutions to create a welcoming work environment and culture that attract talent and help us win clients. The strategic objectives of this council are to:

- Oversee the I&S strategy and help us deliver on our I&S commitments.
- Build awareness around I&S to provide structure, consistency, and alignment.

- Foster a culture of belonging that enables all team members to have a positive and consistent workplace experience that aligns to their professional requirements and personal development goals and empowers a sense of individuality.
- Fully engage leaders in I&S and ensure they embrace the why and can clearly communicate key talking points.
- Identify and address inclusion- and diversity-related barriers to help close career opportunity gaps and increase diversity at all levels in the organization.

We completed the inaugural Carbon Inventory, which tallied the firm's greenhouse gas emissions for the year and developed emissions reduction strategies in an inventory management plan. This was presented to our Governing Board in May and is a significant step in our firm's commitment to sustainable business practices. We look to begin to integrate some of the reduction strategies and recommendations in the future.



Our People

We want to equip our people to be their best selves. We encourage awareness, action, allyship, and accountability while also striving to be a more inclusive and accessible firm.

Starting in August 2023, we launched multiple cohorts of Inclusion Works by Hive Learning.

3,000+

team members actively engaged in this peer-based learning platform

700+

leading sources on inclusion and diversity to elevate their awareness and help the firm cultivate a truly inclusive environment

53,000+

total page views across the firm

Forvis Mazars was one of only three public accounting firms to earn the Military Spouse Friendly Employer designation from VIQTORY, a veteran-owned small business that connects the military community to civilian employment, education, and entrepreneurial opportunities.

In FY 2025, we are opening the door on accessibility. Forvis Mazars has been working to make accessibility a priority for all team members and understands that accessibility in action will enable a wider array of people, no matter their physical limitations, to unlock their potential at our firm. Creating spaces for people where they can come to work as they truly are is key.

Our inclusion network membership continued to grow in FY 2024. The eight inclusion networks (African-American Network, Asian Pacific Network, Enabled Network, Latin American Network, Parents Professional Network, PRIDE+, Veterans Network, and Women Forward) have more than 2,400 members, and have hosted over 30 events since June 1, 2023, creating multiple opportunities for learning, leadership, and community.

Commitment to Our People

We strive to be known for creating engaging opportunities for our people while fostering an environment where they can thrive. We achieve this through talent and leadership development, performance management, and initiatives focused on recognition and retention.

Over the past year, we developed many offerings that genuinely support our people, helping them unlock their own potential—and, in turn, that of our clients and our communities.

In FY 2024, Forvis Mazars accomplished significant integration milestones that included extensive change management efforts related to performance management, bonus programs, and system integration. As we position ourselves as a national leading professional services firm, we are proud to report a notable 5% reduction in turnover. Our key successes over the past year include advancements in talent and leadership development, performance management, and recognition and retention initiatives.

Talent & Leadership Development

Forvis Mazars is committed to cultivating a culture where our people can build remarkable careers by providing access to training and professional development opportunities.

The Talent Development Team recognizes the dynamic nature of the accounting industry and the need for continual growth and learning. Through our Learning & Development, Leadership Institute, and Executive Coaching Programs, we provide our team members with robust technical learning paths, enhanced leadership and professional development opportunities, and access to one-on-one executive coaching relationships and resources.

- In February 2024, the Talent Development Team at Forvis Mazars was recognized as a 2024 Training Magazine APEX Awards Winner, ranking number 24 out of 105. This honor is awarded to organizations that excel at employee training and development.

- The firm also placed number 17 out of 59 on the 2023 list of LearningElite Award finalists by **Chief Learning Officer**, a publication for C-suite and senior-level L&D professionals. This program recognizes organizations from a diverse group of industries with exemplary learning and development strategies and best practices.

The Talent Development Team at Forvis Mazars successfully provided career development opportunities to over 6,000 internal team members through 748 programs and 1,320 individual sessions, which equated to 211,300 credit hours of continuing professional education (CPE).

Recognition

A culture of recognition is essential to a thriving workplace, as it highlights individual achievements and contributions, paving the way for career growth. Our BRAVO! recognition program creates opportunities for team members to publicly express praise and appreciation for one another. Both leaders and peers can boost BRAVO! recognitions for those who receive them. With a remarkable 95% engagement rate on this platform, it's clear that our culture of recognition empowers our people to reach their full potential. Over the past year, team members received more than 107,000 recognitions using the BRAVO! program.

2024 Key Award Winners

The Key Award, the firm's highest honor, is given annually to one partner and one team member who exemplify the firm's cultural DNA. These honorees lead by example and bring the firm's purpose and values to life as they unlock the potential of their colleagues, clients, and communities. Adam Smith was the partner winner, and Holly Reavis was the team member winner for the 2024 Key Award.



Key award

Adam Smith

Partner

Adam is an audit partner who leads our Education Center of Excellence (COE) within the Nonprofit Practice, Education Practice, and Public Sector Practice. He is based in Fort Wayne, Indiana, and has worked with the firm since 2006.

In nominating him for the Key Award, Adam's colleagues noted his encouraging nature, his interest in coaching others, and his insight and guidance.

“Adam is always pushing us to excel and to contribute to building the team and our practice. He continues to be a key part of why we are the number one auditor of higher education institutions in the nation.”

Holly Reavis

Team Member

Holly is a director in our Healthcare Consulting practice, based in Winston-Salem, North Carolina. She has provided a wide range of services to healthcare clients during her 18 years with the firm, but more recently has turned her attention to serving internal stakeholders by leading several complex integration processes.

In their nominations of Holly, colleagues wrote that she is responsive, can bring teams together during times of transition, and is a constant voice of calm and reason. One colleague noted Holly's invaluable contributions over the last year:

“Holly has always found a way to engage in a project, help solve a complicated problem, or aid a colleague in a time of need—all while maintaining a healthy balance between life and work.”

**Be
Bold**





Looking Ahead Is the Future

Thank you for exploring Forvis Mazars in the 2024 Integrated Report. As our profession continues to undergo significant change, the Forvis Mazars global network positions us for continued international growth while our commitment to our 100-year legacy of service will enable us to serve and grow our domestic clients. With our people and clients at the forefront, we offer truly global solutions as we are global to see the big picture and local to understand our clients' needs.

Our future is brighter than ever, operating as a global brand. We eagerly anticipate continuing our integration as Forvis Mazars, while enhancing our business processes. Through this transformation, we will remain agile in the face of change, navigating the remainder of our integration with a commitment to excellence in all things: as builders, in quality, in culture, and within our operations.

Our unique network structure positions us to deliver an Unmatched Client Experience to both current and future clients, whether they have international and local needs. That ethos empowers us to live out our One Firm values daily and apply them to our people and the clients they serve.

We are committed to achieving more as a strong national firm with a global presence and look forward to supporting our people on a path of continual growth, while unlocking the potential of our clients with improved investment power.

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