



MOWERY &
SCHOENFELD

A PLACE TO
start + stay

LEARN ABOUT OUR
FIRM | PEOPLE | BENEFITS | CAREERS
2020-2021 Recruiting Guide



Why M&S

Founded in 1996

Our firm was founded in 1996 by members of large firms looking for a new, more personal way to do accounting. With a focus on building a community of the highest-quality accountants, partnering each day with our diverse network of clients, we prove this vision can be a reality.

Growing Team

Made up of 11 partners and 110 total employees, our Firm ranks among the top 10 in Illinois. We continue to grow our expertise, client base and employee count each year. Our founders and leadership teams are accessible and remain involved in the growth and support of all staff members. Our Firm is small enough to offer exposure to multiple disciplines and projects, while large enough to provide the systems and support employees need. We pride ourselves on being nimble, entrepreneurial and looking at all projects and engagements through the lens of our clients.

Commitment to Caring

We call the Chicagoland area home, and one of our corporate priorities is to make a positive impact on our community. Each year, our team donates over 500 service hours, focusing on charities that help children and promote financial literacy. Team members can participate throughout the summer months during weekly volunteer opportunities during the day, as well as occasional charity events on weekends and evenings. We also join in a number of holiday drives and opportunities to give back.



About Our Firm

Our diverse services are designed to create a clear picture of a company's current performance, as well as its future potential. While associates are hired into a specific department, each will have the opportunity to work cross-functionally, specializing in a specific industry or service in the future.



TAX

Business taxation, High net worth individual taxation, Estate, gift and trust taxation, State and local taxation, Tax transaction advisory



ASSURANCE

Audit, review, and compilation services, Forecasts, Projections, and Agreed-upon procedures



TRANSACTION ADVISORY

Preparing for sale, Due diligence, Tax planning, Transaction structuring, Post-transaction support



SPECIALIZED ACCOUNTING

On-site and cloud based accounting solutions, People and technology solutions, Outsourced CFO advisory



BUSINESS ADVISORY

Business and financial strategy, Risk management, Succession planning



WEALTH MANAGEMENT

Portfolio management, Financial planning, Family office support, Fiduciary support services

MOWERY &
SCHOENFELD



Our Partnership with Xamin

Our firm is always learning, growing and diversifying. In August of 2020, Mowery & Schoenfeld merged in Xamin, a national provider of information technology services. Xamin operates under its own management structure as a subsidiary of Mowery & Schoenfeld.

Xamin provides IT strategy, infrastructure and security solutions. The majority of Xamin clients are highly-regulated businesses, such as banks or healthcare institutions. Xamin is SOC2 certified - the highest standard in the industry for keeping information and systems safe.



OUR MISSION IS TO HELP
our clients *AND* our team

ACHIEVE SUCCESS

FOR OUR CLIENTS

we uncover solutions to business
and financial challenges using an

» ENTREPRENEURIAL

VISIONARY

APPROACH

FOR OUR TEAM

we support a firm that encourages

PERSONAL GROWTH

AND professional development in a

COMFORTABLE *&*

REWARDING ENVIRONMENT



Our Culture

Unlimited Paid Time Off

As accountants, we work hard. While everyone is expected to get the job done and put in hours during busy season, we know down time is important too. Our unlimited paid time off policy is designed to allow you to recoup after a busy season and spend a little time doing what you love. We are always supportive of time needed for illness or personal emergency.

Remote Technology

During normal times, on-site client work, or a pandemic, our organization is equipped with technology to make remote work possible and productive. We use innovative software to communicate, complete tax returns and ensure the security of our client and company information.

Family Leave

We pride ourselves on being a family-friendly work place. This means paid maternity and paternity leave, as well as schedule flexibility. Your career advisor, mentor and human resources are here to help support you.

New Mothers

Changes in family life can be challenging and exciting. We want you to know we support all new mothers by providing paid time off for newborn bonding, flexibility upon return, and a comfortable lactation room.

Flexible Work Space

Our office is open and bright, designed to encourage collaboration with your team. All desks transition from sitting to standing with the push of a button. Should you find yourself in the city for a client meeting or networking event, we also have a satellite office in the Chicago Loop!

Team Activities

In addition to firm-sponsored events, our staff enjoys time playing intramural volleyball, frisbee golf, and other spontaneous outings. Our Social Committee is made up of team members from all departments and levels. However you want to be involved, there is something for you.

Firm Outings

There is never a shortage of opportunities to make memories and bond with the team. A few of our favorite activities include holiday and end of busy season celebrations, annual summer outing, family picnics, family volunteer opportunities, and many more. From happy hours to volunteer days, having fun together has a permanent slot on our calendar!

Benefits Overview

Medical Insurance

Blue Cross Blue Shield of Illinois (BCBSIL)

- Employee eligible immediately
- PPO High Deductible Plan or Blue Advantage HMO
- 100% coverage once deductible is met for the year
- 60% of premium paid by M&S

Health Savings Account

- Use to cover your health expenses today, or save for future needs
- M&S HSA annual contribution (\$1,000 single, \$1,500 family)
- Personal contributions are tax deductible

Flexible Spending / Dependent Care Reimbursement Accounts

- Use pre-tax dollars to pay for qualified dependent care expenses
- Set aside up to \$2,500 per year individual or \$5,000 per year married

Dental Insurance

- Employee eligible immediately
- No wait for preventive services only, 12 months for basic and major
- 60% of premium paid by M&S

Vision Insurance

- Employee eligible immediately
- Exams, lenses and frames every 12 months

Employee Assistance Program

- 24/7 assistance in finding the service providers you need to tackle many of life's challenges
- Financial services, childcare and eldercare assistance, identity theft, legal services, daily living, and more

Telemedicine

- 24/7 access to a physician via phone or email
- Diagnosis and treatment of common conditions

Pet Insurance

- Two plans options depending on your needs
- 24/7 access to veterinarian

401(k) Retirement

- Employee eligible at 1 year of employment
- 3% Safe Harbor Contribution
- Employee may contribute up to the maximum amount allowed by the IRS on an annual basis
- Deductions are made from employee paychecks
- Employees vest immediately in personal and employer contributions

Maternity Leave

- 12 weeks paid leave
- Upon return from short term disability firm will make whole any lost compensation
- May use open PTO for the balance of the 12 weeks of FMLA

Paternity Leave

- 3 days paid leave
- May use open PTO for additional time

Life Insurance

- Employee eligible immediately
- \$15,000 policy per employee
- 100% of premium paid by M&S

Accidental & Critical Illness Insurance

- Employee eligible immediately
- Lump sum payments to help in the event of an accident or critical illness

Disability Insurance

Long Term

- 90 day waiting period
- No loss of group health insurance or seniority
- Employee eligible immediately

Short Term

- 15 business day waiting period
- Employee eligible immediately

LifeLock

- Identity theft protection
- Monitoring, alert, restoration, support, and more

Compensation Highlights

At Mowery & Schoenfeld, we are committed to attracting the most talented CPAs to join our team. We believe in providing a compensation package that is as competitive (if not better) than large accounting firms, while also offering the flexibility and exposure only a smaller firm can provide.

Salary is only one piece of our overall compensation package. This chart shows an example of the total annual rewards offered to a newly hired associate.

Annual value of benefits paid by M&S

• CPA Preparation and test reimbursement	\$4,000
• Annual CPE and professional certifications	3,000
• Medical insurance subsidy	5,500
• Dental insurance subsidy	500
• Health savings account contribution	1,000
• Short-term disability / Life insurance	100
• Estimated social security / medicare tax	4,800
• 401(k) contribution	1,500
• Estimated PTO value	3,800

Your total annual rewards	\$24,200
----------------------------------	-----------------



Best place to work

We take culture seriously!

For ten years, Accounting Today has recognized our Firm as one of the Best Accounting Firm to Work For. This year, Crain's Chicago Business also ranked us among the top places to work in Chicago among thousands of companies. We believe it is this commitment to our team that allows us to continue to also receive recognition for our growth and well being. It is our job to not only focus on supporting our clients, but also the men and women who make up our diverse and talented family.

CRAIN'S CHICAGO BUSINESS
BEST
2020

INSIDE
PUBLIC ACCOUNTING
TOP 300
FIRMS
2020

accountingTODAY
2020
Best Accounting
Firms to Work For

BEST of
Accounting
CLIENT SATISFACTION
2020

HEALTHIEST
COMPANIES
IN AMERICA
2018

AMERICA'S FASTEST-GROWING
Inc. 5000
PRIVATE COMPANIES

Firm Myths

MYTH

Growing firms have fewer resources.

FACT

Mowery & Schoenfeld is committed to providing best-in-class software, hardware, and research materials that is on par with or exceeds that of larger firms.



MYTH

Growing firms offer less opportunities for advancement.

FACT

With less red tape and more client exposure, career advancement and a potential partner track can happen more quickly at our firm.



M&S 401(k) Plan

We want to help you plan for a successful future. Mowery & Schoenfeld has a safe harbor nonelective contribution. This means, regardless of how much you save, M&S is putting away **3% of your salary** each year.

Employees are eligible to participate after one year of employment and **vest immediately** in both personal and Firm contributions.

When we say “UNLIMITED PTO” we mean unlimited!

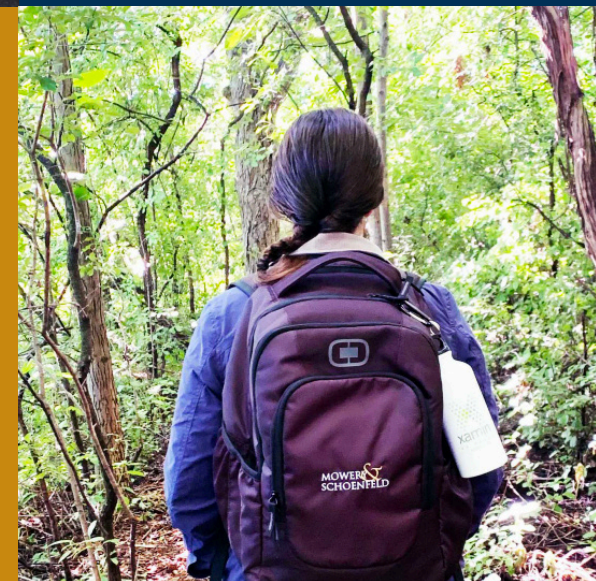
Accounting professionals are expected to work hard during our busy seasons. Because of this, we recognize the need for downtime and personal flexibility. Our general rule is this: we expect our employees to manage their work load and clients professionally and, in exchange, we also believe they should have the freedom to manage their time off.

MYTH

Growing firms offer less exposure to learning opportunities.

FACT

At Mowery & Schoenfeld, our size means you will have more opportunities early in your career to take a leadership role in engagements and gain critical exposure and skills.



2021 Hiring

Over 75% of our
interns accept full-time
positions with the Firm.

Job Shadow

The goal of our job shadow program is to provide early, real life exposure to the accounting profession. This year, our participants will spend a day joining us virtually meeting members of different teams; learning about the life of an accountant and getting to know our firm.

16 Number of
job shadows

OCT Select
MAY students

DEC Job shadows
JUN months

Internship

The goal of our internship program is to provide exposure to all varieties of work in public accounting, giving our interns the confidence to select a career path. Interns can also choose to focus on one area of accounting, such as tax, audit or advisory. Interns are paired with a mentor and buddy to provide support and feedback throughout the process. We offer paid internships during our winter busy season as well as the summer months.

12 Number of
interns

SEP Interview
JAN months

OCT Hiring
FEB months

JAN Starting
JUN date

New Hire

We offer growth opportunities with a local firm culture. Our associates work on challenging engagements that provide the exposure they need to progress in their careers. Each will work with a personal team - buddy, mentor and career advisor - to determine a career path and long-term plan. We want to be the place you start and stay.

10 Number of
new hires

SEP Interview
JAN months

OCT Hiring
FEB months

SEP Starting
(OR OTHER) date



Development Program

Mentoring and support

Each new hire is assigned a buddy, a mentor and a career advisor to guide you throughout your profession. Your mentor and advisor will meet with you regularly, and are always available to answer your questions.

Training and education

Continuing professional education (CPE) is a critical piece of maintaining your CPA certification and building and deepening industry knowledge. We support and cover the cost of career and management training, as well as internally-developed programs, external growth opportunities, and professional memberships.

Evaluation and feedback

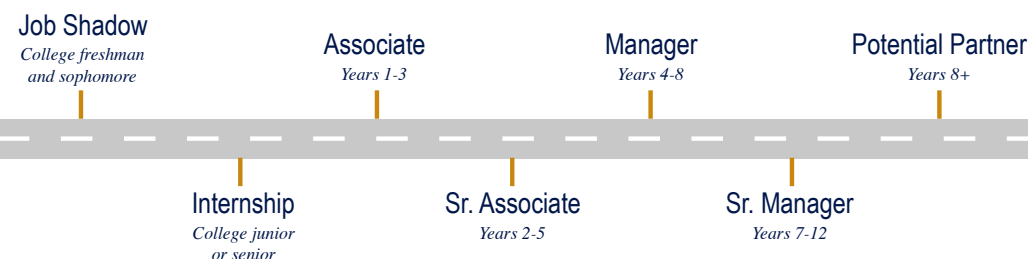
It is critical to our workplace employees feel supported and heard. Each employee will have an annual review and bi-annual goal mapping meeting to ensure timely feedback and development. You will have the opportunity to evaluate management through upward evaluations each year. We also welcome broader satisfaction feedback through our engagement surveys.



Career Progression

At Mowery & Schoenfeld, after technical skills, we value fit above all other candidate qualifications. Many of our employees begin their experience with our job shadow or internship programs, which ultimately leads to employment. This experience gives both the employee and the Firm the opportunity to get to know one another and ensure a successful match. Once a part of the team, we are committed to supporting and growing our members over time. A number of our partners started with the Firm directly out of college. We are proud so many have made Mowery & Schoenfeld home.

Below is the standard career path at M&S. Many advance more quickly. It's all up to you!



Join our team **today**



“ Our people are our most important asset. We want everyone to be **engaged**, **supported** and have **opportunities to grow**. ”



475 Half Day Road, Suite 500
Lincolnshire, Illinois 60069

P (847) 247-8959

F (847) 883-8704

www.msllc.com

@msllccpas

#strongertogether

