



MOWERY & SCHOENFELD

A place to start and stay

2022-2023

FIRM | PEOPLE | BENEFITS | CAREERS

500+
hours donated to charity



**OUR
CORE
VALUES**

People are our
greatest asset

Exceptional
client service

Never stop
growing

THE FIRM
celebrated their

25
YEAR
ANNIVERSARY
in 2021



TOP 200 FIRM
IN THE U.S.

MOWERY & SCHOENFELD

WHO WE ARE

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 and by partnering each day with our diverse network of clients, we prove this vision can be a reality.

Mowery & Schoenfeld, LLC is an accounting, advisory, and IT services firm with offices in Lincolnshire and Chicago, Illinois. Our organization is focused on providing personalized service to each client, building a lasting and trusted relationship. Made up of 20 partners and over 120 total employees, Mowery & Schoenfeld ranks among the top ten firms in Illinois and recently named one of the largest accounting firms in Chicago by Crain's Chicago Business.

We take culture seriously by providing a supportive environment focused on growth. Our Firm has been named a Best Firms to Work For by Accounting Today, a Best Firms for Women by Accounting Today, and a Best Place to Work in Chicago by Crain's Chicago Business. Mowery & Schoenfeld offers comprehensive tax, assurance, transaction advisory, outsourced accounting, wealth management, international onboarding, and business advisory services, as well as managed IT services through our partnership with Xamin, Inc.



M&S
at a
GLANCE



OUR SERVICES

TAX
Business Taxation, High Net Worth Individual Taxation, Estate, Gift and Trust Taxation, State and Local Taxation, Tax Transaction Advisory

CLIENT ACCOUNTING SERVICES
On-Site and Cloud-Based Accounting Solutions, People and Technology Solutions, Outsourced CFO Advisory

ASSURANCE
Audit, Review, and Compilation Services, Forecasts, Projections, and Agreed-Upon Procedures

TECHNOLOGY
Technology, Security Assessments, Workstation and Device Management, Infrastructure Monitoring and Management, Cybersecurity Protection, Recovery Consulting, Security Training

ADVISORY
Preparing for Sale, Due Diligence, Tax Planning, Transaction Structuring, Post Transaction Support

WEALTH
Portfolio Management, Financial Planning, Family Office Support, Fiduciary Support Services

**Best Places to
Work in IL 2022**
A workplace analysis and competition



2
LOCATIONS
20
PARTNERS
120+
EMPLOYEES





VOTED THE BEST PLACE TO WORK

BECAUSE WE TAKE CULTURE SERIOUSLY

Inc. 5000
Regionals
— MIDWEST —
2021

CRAIN'S CHICAGO BUSINESS
BEST
PLACES TO WORK

INSIDE
PUBLIC ACCOUNTING
TOP 200
FIRMS
2022

Best Places to
Work
2022
A workplace analysis and competition

accountingtoday
2022 Best Firms
to Work For

BEST of
Accounting
CLIENT SATISFACTION
2022

UNLIMITED PAID TIME OFF

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 do not penalize anyone for legitimate illnesses, personal emergencies, or just needing some time away.

HYBRID & FLEXIBLE WORK

We are committed to creating a flexible and hybrid work culture for all employees to enable them to achieve a more successful balance between work responsibilities and personal life. This means employees may work somewhere other than the company's office as long as the needs of the business are met. We also always look forward to seeing our team members at our Lincolnshire and Chicago offices. We also typically offer flex time or a summer schedule during the warmer months.

FAMILY LEAVE

We pride ourselves on being a family-friendly work place. This means paid maternity and paternity leave, as well as schedule flexibility.

TEAM ACTIVITIES

In addition to Firm-sponsored events, our team enjoys time together at off-site events such as, kickball tournaments, holiday lunches, and escape rooms—as well as other spontaneous outings. 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. From happy hours and volunteer days to family picnics and more, fun has a permanent slot on our calendar.

CHECK OUT OUR BENEFITS

MEDICAL INSURANCE

Blue Cross Blue Shield of Illinois (BCBSIL)

- Employee eligible immediately
- Three plan options depending on your needs
 - BlueAdvantage HMO (Traditional HMO)
 - BlueEdge HSA (High Deductible PPO)*
 - BluePrint PPO (Traditional PPO)**

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

HEALTH FLEXIBLE SPENDING ACCOUNT**

- Use pre-tax dollars to pay for qualified medical expenses if enrolled in Traditional PPO plan

DEPENDENT CARE REIMBURSEMENT ACCOUNT

- Use pre-tax dollars to pay for qualified child or dependent care expenses

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, eldercare assistance, identity theft, legal services, daily living, and more

PET INSURANCE

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

401(K) RETIREMENT

- Employee eligible after 30 days 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 paycheck
- Employees vest immediately in personal and employer contributions

MATERNITY LEAVE

- 12 weeks paid leave

PATERNITY LEAVE

- 5 days paid leave
- May use 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
- Employee eligible immediately

Short Term

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

NORTON LIFELOCK

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

TELEMEDICINE

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

CPA SUCCESS PROGRAM

One of the highest achievements you will make in your early career is to complete and pass the CPA exam. Our CPA Success Program is designed to offer you the support and infrastructure you need to focus on studying for and passing the exam, removing as many administrative and scheduling burdens as possible.

Success plan

We will begin the journey by meeting with you to develop an individualized timeline, goals, and administrative support needs.

Schedule adjustment

We will work to ensure your workload reflects the time you need to study and sit for exam sections, this may include paid time off or an adjusted schedule.

Training curriculum

We will determine the most effective study tools, outline, and timeline. M&S covers the costs of all study programs and materials needed to pass the exam.

Administrative support

We will remove the administrative burden of sitting for the exam, guiding you through the application process and interaction with governing boards.



A REGIONAL FIRM **COMMITTED 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.



GLOW

GLOW—or Growth and Learning Opportunities for Women—seeks to address the number of women who leave public accounting mid-career. Our goal is to educate and elevate those in our Firm to ensure all voices are represented in leadership of all levels. This organization is employee led and focuses on the pillars of personal, professional, and community growth.



START AND STAY

JOB SHADOW

The goal of our job shadow program is to provide early, real life exposure to the accounting profession. Each year, our participants spend a day meeting members of different teams, learning about the life of an accountant, and getting to know our Firm.

INTERNSHIP

The goal of our dual 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.

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.

DEVELOPMENT PROGRAM

Our Employee Experience framework is designed to help our team members grow and succeed from day one. We support our employees by providing transparency and clear expectations every step of the way.

Learning and Development

- Onboarding
- CPA Success Program
- Ongoing Technical Training
- Leadership Skills Training
- Role Development

Career Paths

- Career paths by level
- KPIs by level
- Role descriptions and expectations
- Compensation and bonus plans*

Feedback & Goals

- Quarterly discussions
- Feedback (self, peer, upward)
- Goal setting

Culture

- Team building
- M&S Cares
- GLOW
- Wellness Committee
- Firm events

*in process

IMPORTANT DATES

	INTEREST / INTERVIEW	HIRING	START AND STAY
JOB SHADOW 12 participants	September-February	March	May
INTERNSHIP 16 interns	September January	October February	January June
FULL-TIME HIRE 12 new hires	September January	October February	November (or other)

JOB SHADOW

College freshman and sophomore

ASSOCIATE

1-3 years

MANAGER

4-8 years

POTENTIAL PARTNER

8+ years

INTERNSHIP

College junior and senior

SR. ASSOCIATE

2-5 years

SR. MANAGER

7-12 years

FIRM FACT: 90% of our interns accept an offer to work at Mowery & Schoenfeld.



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