

+ 2021

# IMPACT REPORT



## + OUR FIRM

MCM CPAs & Advisors is a strategic business advisory firm on a mission to help organizations of all sizes and structures throughout various industries. We provide a wide range of services, including traditional tax and assurance offerings and advisory services developed to meet the ever-changing needs of our clients to help them reach their short- and long-term goals.

We combine the technical and industry expertise of a larger firm without sacrificing the attention and personal service of a local firm. MCM continues to grow yet maintains the same friendly, approachable style of doing business that our clients have come to rely on and expect.

MCM is a family of companies, including our partners at MCM HR Solutions, MCM Technology Solutions, MCM Capital Markets Group, and Meritrust Wealth Management, that provide a holistic approach to solving the problems that keep our clients at night.

MCM is proud to be ranked as a top 100 accounting firm by Accounting Today and Inside Public Accounting, recognized as a Best Place to Work, and named to Inside Public Accounting's Best of the Best Firms list.



**6 Offices | 3 States**  
**350+ Employees**  
**56 Partners**  
**12 Principals**

### OUR FAMILY OF BRANDS



## A NOTE FROM THE MANAGING PARTNER

Our firm is built on our core values - people matter, leaders inspire, and excellence rules, and they are exemplified in everything we do. We are continuously challenging our team to enhance how we show up in the community and the impact of our work.

Even though the past couple of years have been challenging and changed the way we work, we have been able to grow, connect, and have a positive impact on our communities.

MCM is dedicated to growing our culture, creating consistently exceptional service, and leveraging technological solutions for firm efficiency. In 2021, we were able to make significant strides towards these goals.

We were recognized as a Best Place to Work in all of our markets, a Best Accounting Firm for Women, and Best Firm for Equity Leadership by the Accounting MOVE Project among others.

I'm proud of our team, the work they do, and what we have accomplished as a Firm thus far. It will be exciting to see what 2022 brings and how much we will accomplish in the coming years.

**BRAD SMITH**

# PEOPLE MATTER



We genuinely care about our people, personally and professionally, and ensure relevance in their work. We also care about our communities and the future generations. As a firm, we are dedicated to continuously improving and helping those around us.

## ENSURING EVERYONE FEELS LIKE PART OF THE TEAM DIVERSITY, EQUITY, & INCLUSION

In 2020, our Firm signed the CEO Action Pledge and embarked on a journey to expand our understanding and commitment to Diversity, Equity, and Inclusion (DEI). MCM stands in support of social justice, investing in changing our workplace and our community for the better.

MCM has expanded our membership and partnership with industry organizations committed to diversity, including the National Association of Black Accountants (NABA), the American Institute of Certified Public Accountants (AICPA), and Pope Consulting Group, to develop strong DEI programming and initiatives.

Internally, we engage our team members in expanding their understanding through regular Community Conversations in which we invite community leaders to educate our team members on their DEI-related missions and hosting external events to educate diverse college students on opportunities available within accounting-related majors.

MCM is proud to be recognized by the Accounting Move Project as a Best Accounting Firm for Women and Best Firm for Equity Leadership.

## INVESTING IN FUTURE ADVISORS ASCEND & RECRUITING EFFORTS

Each summer, MCM hosts Ascend—a program designed principally for third-year college students interested in a career in the accounting field. Ascend is a great way for accounting students seeking internships or full-time positions to learn about our Firm, meet team members and Firm leaders, experience our culture, and network with other accounting students from schools across the region.

Last year, we had 34 students attend the event, and we were able to welcome 25 of those students to MCM as either interns or associates.

We are committed to attracting the best and brightest accounting students. In 2021, we attended more than 45 recruiting events on our surrounding campuses.



# LEADERS INSPIRE



We inspire each other to sustain our vision and advance our mission as a firm - to help both our clients and team succeed. We want to encourage our team to help take the Firm to the next level. We are committed to providing the most relevant services to our clients and cultivating an environment where our employees can grow in their careers. Our clients count on us to be their trusted advisors, providing critical information and forward-thinking strategies so they can make informed decisions and reach their goals.

## RAISING THE BAR SHARK TANK

In 2021, MCM launched our Shark Tank initiative, designed to harness imagination and innovation throughout the Firm on ways we could improve. The objective of the program is to encourage team members to team up to create new processes, inventions, or improve existing protocols. The initiative provides a platform for innovation which can bring direct change, empowering team members with the opportunity to impact our organization and drive innovation across MCM. In our inaugural event, participants presented their ideas to a panel of internal team members for review and feedback. Prizes were awarded to the top three teams and their concepts will be implemented going forward.



## RESOURCE CENTER PROVIDING CONTINUING EDUCATION

MCM is committed to being thought leaders in our profession, our specialized industry and service areas, and our communities. We share the latest knowledge and legislation with our clients regularly so they can stay ahead of the curve.

This year, we created the MCM Professional Education web platform to host all of our educational content in one place. On our website, individuals can register for future events and access past webinars. This year we were able to offer 29 events and more than 35 hours of CPE.



### 2021 EVENTS RECAP

- Annual Update
- Manufacturing Summit
- Succession Planning Fundamentals
- Construction Summit
- M&A Strategy Series
- What is an Exit Strategy and Why Do You Need One?
- Provider Relief Funds
- Family Business 101
- Not-for-Profit Summit
- ARPA & COBRA Update
- EOS™ Mini Series
- Commercial Real Estate Industry Update
- Employee Retention Credit
- Insurance Summit

# EXCELLENCE RULES



We are committed to superb client service, high-quality expertise, and significant client relationships, setting us apart from other CPA and advisory firms. Our success is driven by our dedication to helping our clients and communities thrive.

## STRIVING TO BE THE BEST 2021 ACCOMPLISHMENTS

MCM commands a strong reputation both within our industry and the communities we serve. This reputation is regularly reflected via awards, invitations to serve as thought leaders, and media recognition. Here are our achievements for 2021.

- IPA Top 100
- Best of the Best (IPA)
- Innovative Workplace finalist
- 3rd Healthiest Employer in Kentucky
- Best Firm MOVE Project
- Best Firms for Women - Accounting Move Project
- Polar Plunge Corporate Division Winner
- Best Place to Work - All markets
- 20 People to Know in Accounting - Tory Stanley (Louisville Business First)
- Most Admired CEO - Brad Smith (Louisville Business First)



## CREATING RELATIONSHIPS IN THE COMMUNITY COMMUNITY INVOLVEMENT

MCM is proud to say “we’re home” in five different regional communities. In addition to serving our clients, we partner with a number of not-for-profit organizations through fundraising, volunteering, and donating, which continues to build on the foundation of our founding partners who instilled a legacy of connection in our communities.

Our Charitable Action Committee (CAC) is committed to our communities and spearheads initiatives internally and externally, through charity drives and regular volunteer participation opportunities.

MCM regularly provides funds and volunteers time to more than 125 not-for-profit organizations. We invest in our communities by supporting organizations like Metro United Way, Fund for the Arts, Special Olympics of Kentucky, LexArts, Habitat for Humanity, Ronald McDonald House Charities, Teachers’ Treasures of Indianapolis, Junior Achievement, Arts Wave, Salvation Army, CASA of Southern Indiana, Homeless Coalition of Southern Indiana, Chrysalis House, Million Meal Movement, LCCC, and Adopt A Class.



**2,800**  
VOLUNTEER  
HOURS

**\$296,000**  
BACK TO  
THE COMMUNITY

**162**  
BOARDS  
SERVED



**MCM CPAs & Advisors**  
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