



CLA Promise and Transparency Report

Published January 2024



At CLA, our promise is to know you and help you. We truly believe in building deep, long-lasting relationships with our clients, our people, and our communities.



In 2023, we celebrated achievements, expanded to new locations, and approved a historic plan to invest hundreds of millions of dollars in artificial intelligence and digital solutions.

But we're not stopping there. By accelerating our investments, we will create a more seamless and efficient experience for our clients, improve processes to enhance the way our people work, and deepen our impact on our communities.

At CLA, we know that our people are the key to our success. Their talent, commitment to our clients, and dedication to helping our communities is what sets us apart. Our future is bright, and we're excited to see where it takes us.

Thank you for reviewing this year's Promise and Transparency Report. We look forward to connecting with you again soon.

All the best,

Jen Leary
CEO, CLA



LIVING
THE CLA PROMISE

LIVING THE CLA PROMISE

In 2023, CLA family members took the CLA Promise, to know you and help you, to entirely new levels. As the firm celebrated “The Year of the Client,” we engaged with our clients in various ways, seeking new opportunities to help them grow and prosper.

And CLA continued to be innovative, announcing significant investments in artificial intelligence (AI) and digital technology to disrupt the profession. Rather than sitting on the sidelines, CLA is helping lead the way, embracing transformative digital solutions for both our people and our clients, and our collective futures.

We’ve also enjoyed continued growth, expanding into new markets while staying true to our culture and our unwavering commitment to diversity, equity, inclusion, and belonging (DEIB).

THE FUTURE IS NOW



“As we think about where technology is going, we believe it has the power to completely transform every inch of our firm. Alongside our data scientists and talented technology teams, we are harnessing these new technologies to help lead our firm and our industry forward, to set new standards, and to be staunch advocates for democratizing access to these advances to all.”

— JEFF VRIEZE
CHIEF TRANSFORMATION OFFICER





FIRM HIGHLIGHTS

FIRM HIGHLIGHTS

2023 in review

Recertified as a
[Great Place to Work®](#)

Committed \$500 million
to digital solutions to disrupt
and transform the profession

Launched CLAgpt

CEO Jen Leary named among top
100 most influential people in
accounting by *Accounting Today*

Ranked #8 top accounting firm
by *Accounting Today*

Grew the CLA national footprint,
adding firms in New Jersey, New
York, Ohio, and Washington state

Named first chief transformation
officer, Jeff Vrieze, to lead CLA
digital transformation



Named a Seramount U.S. Top 100
Best Company for working parents

Celebrated CLA Wealth Advisors
rank of 50th on Barron's Top 100 RIA
Firms list, which recognizes the top
independent advisors of 2023

Achieved 14% growth, taking us
to \$2B in revenue

Expanded CLA Global, with the
addition of firms in Czech
Republic, Germany, India,
Mexico, and Slovakia

Debuted "The Gateway" office
concept in New York City, offering
an interactive, technology-driven
CLA client experience

Established CLA high school
internship program, hosting 60
students in 15 select CLA offices

Committed to seven
technology innovations to
change the way we work

Received a 2023 Campus Forward
Award for our DEI-centered
recruiting efforts


OUR PROMISE
TO OUR CLIENTS



OUR PROMISE TO OUR CLIENTS

Driving change

Change is a constant and something we embrace at CLA. Technology-driven transformation is here as we reimagine the way we serve our clients across all segments, industries, and services.



“Our digital service line is really about three things: helping our clients with data, helping our clients with automating their processes, and helping our clients with software ... let’s keep pushing the boundaries of the possible.”

— **YASSIR KARAM**
CHIEF SOLUTIONS OFFICER

In 2023, we promised to bring all of CLA to our clients, embracing a seamless approach to service. From tax to audit, wealth advisory to digital solutions, to consulting and outsourcing, CLA provides our clients with a wide array of services to create opportunities and grow their business.

We are not only embracing change but leading it. We’re investing in data methodologies including large language models to help our clients keep pace in the digital evolution. We are bringing advanced technology resources directly into the communities we serve. We’re empowering our clients to adopt new technology to help with their digital transformation as well.

Data is powerful. As we work with businesses to better understand their data and put it to work for them, we see their potential for exponential growth in the years to come.



OUR PROMISE TO OUR CLIENTS

Delivering digital impact

CLA helped clients across the country and around the world to implement digital solutions to move their businesses and organizations forward.

Among them, Gleaners Food Bank in Indiana, which needed better data to quickly get food donations where they're needed most.

Read the full story in *The Wall Street Journal*.



“The ability to increase output at a time when there’s a growing demand has been huge. Without these technology changes, there’s no way that would happen.”

— **JOE SLATER**
CHIEF OPERATING OFFICER, GLEANERS FOOD BANK



“One of our greatest strengths is how deeply we get to know our clients. We listen. Then we tailor our approach based on what is going on in that business, and come back with cross-functional teams, including industry professionals to really address their pain points with strategies and solutions that come from across CLA.”

— **NANCY BROWN**
CHIEF SEAMLESS OFFICER



OUR PROMISE TO OUR CLIENTS

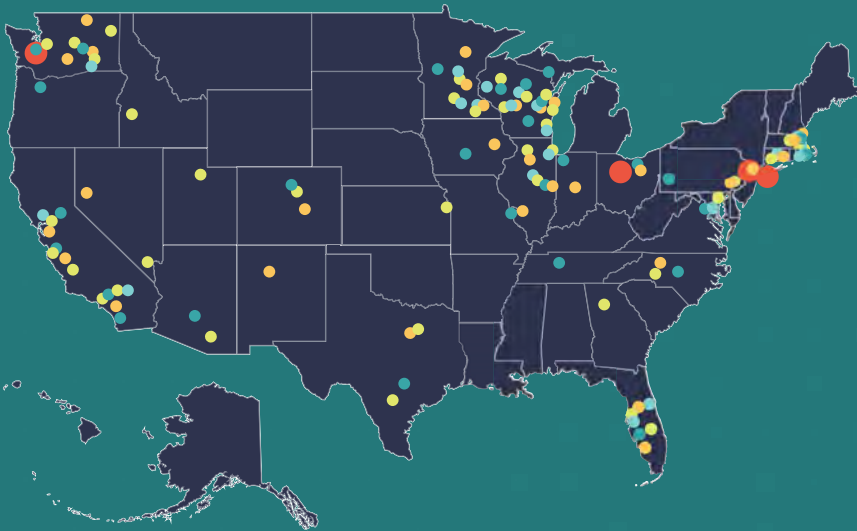
Growing our vision

With more than 130 locations, CLA's growing presence in communities across the country brings our professionals directly to the clients we are helping to grow.

We have long-term, deep relationships with our clients that go back decades. With our guidance local businesses, nonprofits, and other organizations thrive.

Our vision for CLA is growing and so is our footprint. In 2023 we welcomed the team members of four legacy firms to the CLA family:

- **Gilmore Jason Mahler** in Maumee and Findlay, Ohio
- **SobelCo** in Livingston, New Jersey
- **Frost & Company** in Tacoma, Washington
- **Richards, Witt & Charles** in Garden City, New York





OUR PROMISE TO OUR CLIENTS

Celebrating our expanded global organization

CLA Global Limited (CLA Global), the organization comprised of independent accounting and advisory firms, gained four network member firms and nine alliance firms.

“We made the decision in 2021 to dream a little bit about our international reach. Well, that dream came true, and we are going to continue to expand that CLA Global brand around the world.”

— **SCOTT ENGELBRECHT**
CHIEF GEOGRAPHIC OFFICER
CLA GLOBAL BOARD CHAIR

Founded in 2022, **CLA Global** offers one of the largest financial outsourcing services, private client, and wealth advisory platforms of any global accounting organization. Already listed as a Top 15 Global Network Firm, CLA Global is attracting innovative, groundbreaking firms to join this distinct group.

Joining CLA Global in 2023 were:

Network firms

- dhpg in Germany
- VGD Slovakia in Slovakia
- VGD Czech Republic in the Czech Republic
- CLA Global Indus Value Consulting in India

Alliance firms

- González Espinosa y Asociados SC (Mexico)
- PRIOR GmbH Wirtschaftsprüfungsgesellschaft (Germany)
- BSWP (Germany)
- BTR Sumus (Germany)
- Cordes + Partner (Germany)
- LTS (Germany)
- MRT Tax (Germany)
- RTW RevisionsTreuhand GmbH & Co. KG (Germany)
- S.E. AUDIT (Germany)



OUR PROMISE TO OUR CLIENTS

2023 client service at a glance

Strong numbers tell the story of how we know and help our clients by living the CLA Promise, delivering seamless services across industries and across the globe.

218,000+	Active clients
7,700+	Clients engaged in global capabilities
1,200+	Clients engaging employee benefit plan capabilities
128,000+	Private households served
11,100+	Nonprofit organizations served
3,100+	Government organizations served
620+	Higher education organizations served
4,500+	Financial institutions served
10,900+	Health care organizations served
52,100+	Clients engaging outsourcing capabilities
7,600+	Clients engaging wealth advisory capabilities
14%	Organic growth



Elevating our in-person client experience

Our promise to know you and help you reached new heights in 2023 as CLA opened its first experience center on the 51st floor of One Grand Central Place in New York City. The new space – dubbed The Gateway office – is designed to engage our family members and clients in new, interactive ways, and serve as “the gateway” for CLA’s growing global business. More than 120 clients came to tour the new space and hear from CEO Jen Leary at the grand opening reception in October.



Community and client impact

Belonging, community engagement, and the CLA Foundation

Our community and client relationships bring together the work and missions of diversity, equity, inclusion, and belonging (DEIB), the CLA Foundation, our community engagement team, and our client service efforts. It's simple: Belonging is a part of all we do; belonging is in our DNA at CLA.

Our firm's commitment to serving the thousands of communities that our clients do business in is interwoven into how we do business because our family members live and work in those same communities, all across the country. We are present and engaged in our communities to better understand where we can help. We are board members of local nonprofits, volunteer coaches for youth sports teams, and proud supporters of advancing the efforts of diverse professional networks, just to name a few.

Supporting Native nations

In October 2023, CLA graduated the first class of participants from the Tribal Finance Program, a two-year, cohort-based program in collaboration with CLA client Native Governance Center to support Native nations in building their financial leadership and capacity through assessment, training, resources, and mentorship. Participating Nations included Bois Forte Band of Chippewa, Cheyenne River Sioux Tribe, and Yankton Sioux Tribe.



First Cohort to Graduate from the Tribal Finance Program

Photo credit: Alejandro Higuera for Gila River



OUR PROMISE
TO OUR PEOPLE



OUR PROMISE TO OUR PEOPLE

At CLA our culture is powered by our values and our promise.

We strive to provide brave spaces where our family members find an intrinsic sense of belonging. It is important that we encourage and embrace an inclusive culture that brings different beliefs and perspectives to the table to build relationships based on trust and respect.



“CLA is committed to building a diverse workforce, a workplace with equitable opportunities, and a workplace of belonging. As we progress toward our diversity, equity, inclusion, and belonging goals it is important that we continue to share our efforts. 2023 proved to be another great year. While we still have work to do, we continue to learn and grow by actively listening to the needs of our people and our communities.”

— CATHY CLARKE
CHIEF CULTURE OFFICER



OUR PROMISE TO OUR PEOPLE

Belonging

The CLA connection team leads efforts from coast to coast that focus on creating an open culture where all have a sense of belonging at CLA.

As a firm and a family, we are guided by our five values: curious, collaborative, inclusive, reliable, and transparent. We live our values each day, which allows us to create more opportunities for how we understand and serve our clients, our people, and our communities.



Pictured, left to right: Cathy Clarke, Chief Culture Officer, Kate Deyle, Community and Affinity Leader, Mindy Plewacki, Executive Director, CLA Foundation, Beth Knight, Managing Director of Learning and Connection, Leea Carter, Director of DEI Operations, Kristina Jennings, DEI Communication and Project Associate, Sophia Carter, DEI Operations Associate, Fola Abiola-Banjac, Principal SAS, VFLI, Keesha Whitfield, Diversity Recruiting Director, Kevin Kirsch, Lead Well Coach, Cynthia Blake, Family and Affinity Connector



Our promise is to know you and help you.

By living our values, CLA embeds diversity, equity, inclusion, and belonging in our daily practices.

2023 DEIB highlights:

Introduced a supervisor toolkit for disability concerns through the abilities at CLA virtual belonging community (VBC)

Celebrated more than 300 CLA family members serving as DEIB ambassadors across our locations

Launched pilot VBC mentorship program

Participated in an HBCU (historically Black colleges and universities) roundtable with Howard University, Bowie State University, and Lincoln University

Co-taught nonprofit accounting and forensic accounting courses at Howard University

Provided externship for first professor in residence from Howard University

Created common interest groups to tackle issues and topics of the day

Awarded \$5,000 scholarships to students at the NABA convention

Completed second year of CLA women's sponsorship program, with double the applications and participation, giving targeted resources to women elevating to leadership at CLA

Hosted our second Belonging and Inclusion Summit

Attended regional and national conventions for ALPFA, Ascend, and NABA

Grew our connection team with additional full time resources focused on DEIB



OUR PROMISE TO OUR PEOPLE

Our family members' inspired careers:

2,986

People joined CLA

313

Advanced or transitioned to director path

233

Advanced or transitioned to principal path

165

Pursued mobility opportunities

289

Alumni rejoined CLA

650

Learning sessions were held

1,131

Declared a new industry

Finding new ways

CLA embraces change. It is what working in professional services is all about. So, we are rethinking the way we work and how we show up for our clients.

As we continue to lean into our inspired careers across CLA, we are embracing transformative technologies, including AI. We're reshaping our futures. We know the next generation of leaders are ready to change the way we help our clients. That is transformational. That is disruption.

CLA's investments in digital technology and AI are streamlining the way the next generation of professionals will serve our clients. Starting with onboarding, automating scheduling, transforming document storage, elevating our marketing technology, and using our data to drive seamless connections, CLA is at the forefront of innovation. We're primed to lead in new ways that will enhance our client service experience and introduce our people to new tech-driven inspired career opportunities.



OUR PROMISE TO OUR PEOPLE

Listening to our people

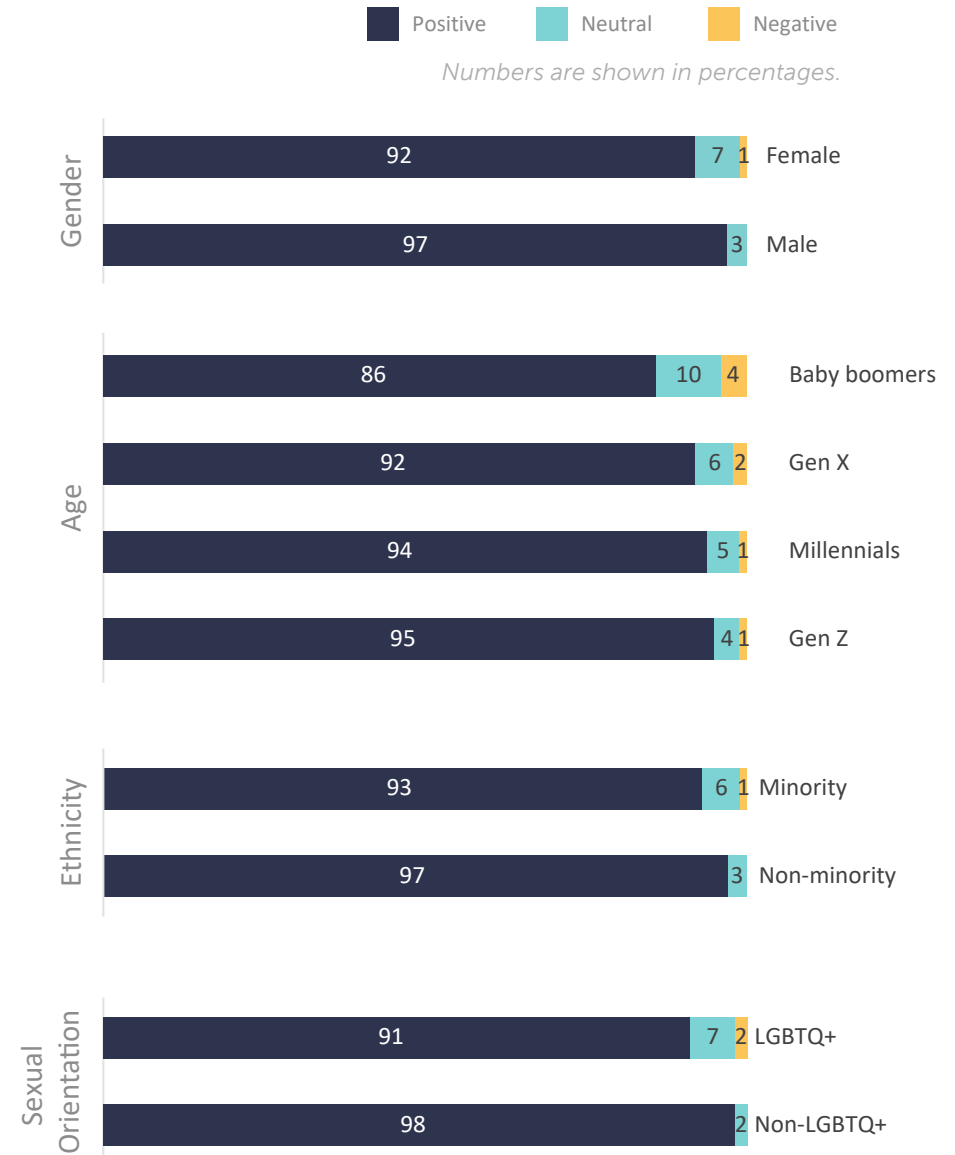
We strive to be a welcoming workplace for all who join the CLA family. To measure progress, CLA engages Great Place To Work®, the global authority on workplace culture, to survey our family members.

Great Place To Work has conducted anonymous surveys for CLA to measure workplace experience and culture since 2021. When asked whether people are treated fairly, regardless of their gender, age, ethnicity, and sexual orientation, we saw consistently high affirmative responses among all CLA family members.

CLA was recertified as a Great Place To Work in 2023 based on employee workplace experience.



Survey question: People are treated fairly regardless of gender, age, ethnicity, and sexual orientation.



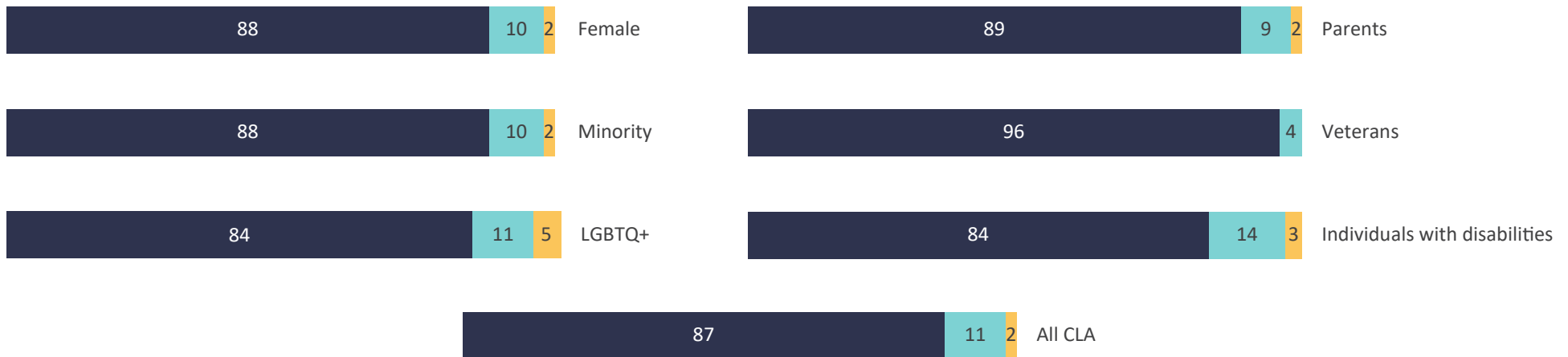
Listening to our people (continued...)

At CLA, our succession mindset underscores our desire to hire, engage, and advance underrepresented voices in our field. We know we must continue to weave DEIB into our succession philosophy as we look to the future.

Below are the responses to the question, "Taking everything into account, I would say this is a great place to work." from our 2023 Engagement Survey.

This is a great place to work

■ Positive ■ Neutral ■ Negative
Numbers are shown in percentages.



OUR PROMISE TO OUR PEOPLE

Wellness

Taking care of each other, and ourselves, is paramount at CLA. In a fast-paced business, CLA encourages our team members to take care of their whole selves.

Our collaboration with Thrive Global continues to strengthen with a 92% utilization rate of Thrive's well-being platform by CLA family members and their families. CLA created the role of live well leader to support wellness across the firm and contracted with a fitness and nutrition coach to join the live well team. The live well team tackles topics from stress management to gut health, and offers individual coaching related to overall mental wellness, nutrition, and fitness topics.

In recent years, CLA has committed to new wellness programs to improve the health and well-being of the entire CLA family, not just our team members, but their families as well. In 2023, we doubled the available wellness stipend. The firm remains committed to understanding and meeting the evolving needs of the entire CLA family. In response to feedback from our people in the 2023 Great Place To Work Survey, we are implementing additional benefit programs in 2024. Expanded benefit programs include support for foster families, a resource hub for parents, and digestive health support, among others.



“Travel, wellness, and recharging are my priorities. We have always wanted to backpack across Europe with the kids, so this was a dream come true.”

— KATE PHELPS
TAX PRINCIPAL
ON CLA'S FLEXIBLE PTO OFFERING



OUR PROMISE TO OUR PEOPLE

Making connections, celebrating successes

The 2023 CLA Learn, Experience, Achieve, and Propel (LEAP) conference in San Antonio, Texas brought together more than 1,700 CLA seniors and associates from offices across the country to make new connections.

This conference helped them gain valuable experience in managing projects, conflict, client interactions, and so much more as they grow in their inspired careers at CLA. A few highlights from this year's conference follow in the video below.



“We were inspired within our careers on what paths and opportunities are out there within the United States and globally. We had meaningful conversations about caring for one other, encouraging each other along the way, showing gratitude, and much more.”

— **CRISTINA BONILLA**
ASSURANCE SENIOR
LEAP ATTENDEE



OUR PROMISE TO OUR PEOPLE

Inspired careers

We celebrated professional growth for all CLA family members advancing in their inspired careers.





OUR PROMISE TO OUR PEOPLE

Transparency and belonging

At CLA our culture of belonging impacts each of us as we explore our inspired careers. We celebrate our differences, which bring us together and make us stronger as a team, and as a family. This year's Belonging and Inclusion Summit held in Phoenix, Arizona, brought together 250 CLA family members from 64 offices around the country, including DEIB ambassadors, representatives from all nine CLA VBCs, and leadership.

The event was an acknowledgment and celebration of those involved in our DEIB efforts, which featured messages from leadership and talks by DEIB industry leaders.

"As a leader, we set the weather. Do we bring sunshine and clear skies or storms? We have the opportunity to bring joy to the teams we lead and make sure everyone sees that they belong."

— JEN LEARY
CEO



OUR PROMISE TO OUR PEOPLE

Dare to dream

Some dreams are just meant to be.

Lindsay Wrege, co-founder of 3-2-1 Coffee in Raleigh, North Carolina, was intent on pursuing a medical degree when she entered college at age 18. But in the back of her mind, she knew she always wanted to give back in a different way, to help her lifelong friends who struggled to find meaningful and lasting jobs.

Wrege sought to open a coffee shop to employ individuals with disabilities. She knew the challenges, and the success rate of any small business succeeding, but she was determined to give back, to make a difference.

In 2020, the CLA Foundation helped 3-2-1 Coffee with a grant, allowing Wrege and her team to purchase a coffee roaster for the first time. From there, their story blossomed, as more and more people took notice of the work she was doing in the community.

Wrege brought her remarkable story to CLA's Belonging and Inclusion Summit in 2023, challenging our people to take a chance, to do one small thing that could blossom into one big thing.

Today, 3-2-1 Coffee has four locations in Raleigh, with two more on the way. They ship coffee across the country and Wrege has an employee waiting list of nearly 200. She is showing the world that people with developmental disabilities are exceptional workers, dedicated to their craft and eager to learn more each day. Her story is one of amazing success, helped along by the generous donation of the CLA Foundation.



2023 notable DEIB awards and recognition

View all [CLA awards and recognition](#).

2023 Campus Forward Award recipient for diversity and early career hiring efforts

Certified Great Place to Work® 2023, based on culture, including DEIB efforts

Association for Accounting Marketing – Marketing Achievement Awards for the DEIB category

Seramount 100 Best Companies for working parents winner

Providence Business News DEI award winner (category, accounting Rhode Island office)

New Jersey Business & Industry Association/New Jersey Business Magazine Diversity, Equity & Inclusion 2023 Award winner





OUR PROMISE TO OUR PEOPLE

DEIB across our locations

Our DEIB ambassadors are the heart of our belonging team across CLA's 130+ locations.

Our commitment to DEIB isn't words on paper — we live this commitment through our connections, how we recruit the next generation of leaders, and how we embrace our culture.

Bethlehem

The Bethlehem, Pennsylvania office sponsors the Bradbury-Sullivan Enchanted Garden Gala. Bradbury-Sullivan is an organization that supports members of the LGBTQ+ community in the Lehigh Valley.

Charlotte

Charlotte DEIB ambassadors organized a lunch in honor of Martin Luther King, Jr. Day.

Minneapolis

Celebrating DEIB in Minneapolis with a client panel discussion.

Orlando

The Orlando office celebrated Asian American Pacific Islander and Jewish American Heritage Month by hosting a potluck before the Wellness Wednesday webcast.

Salt Lake City

The Salt Lake City office put their best efforts forward by providing an environment focused on inclusion. They engaged their office by hosting events for CLA family members to learn more about diverse backgrounds, celebrate cultural observances, and connect with one another.



OUR PROMISE TO OUR PEOPLE

Embracing all voices

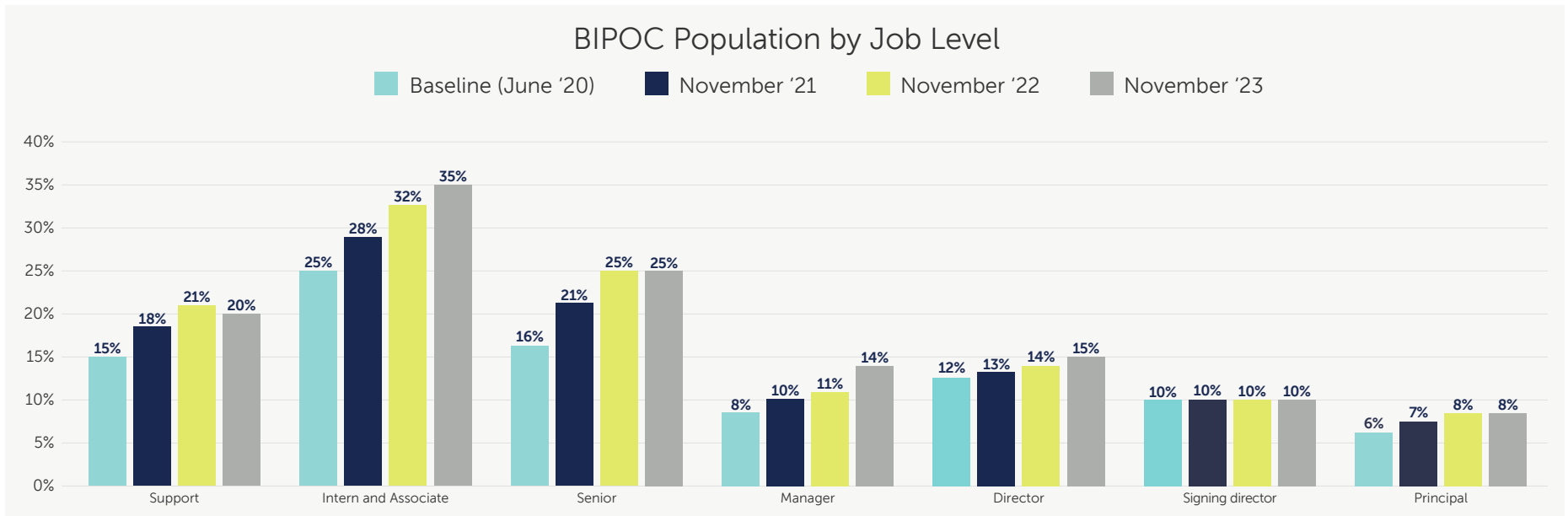
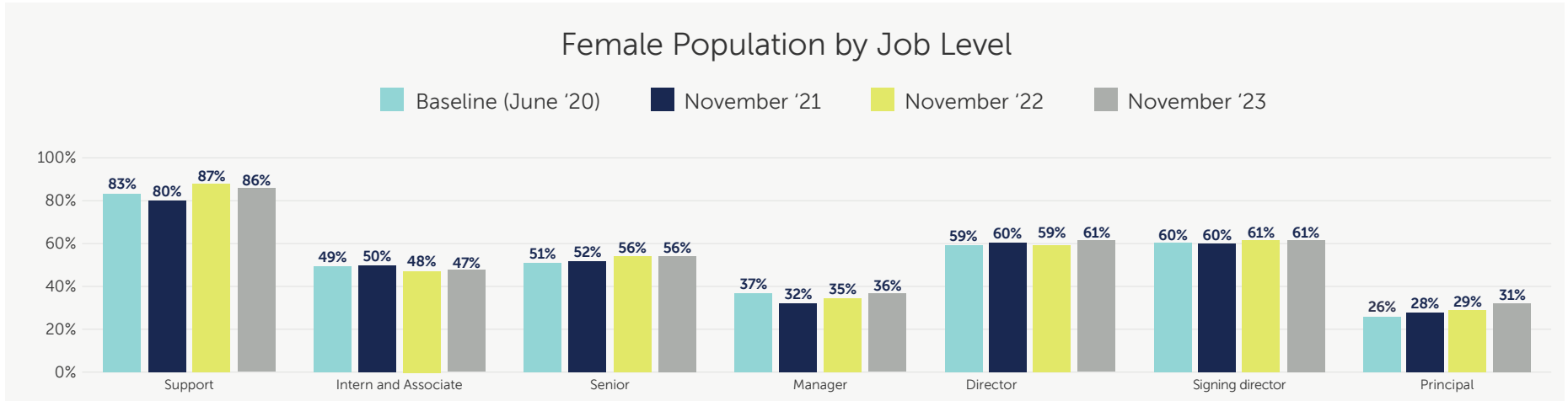
CLA is a place of belonging. A place where people come together, bringing different life experiences, professional backgrounds, and perspectives. A place that embraces all voices. We continue to see growth in attracting a diverse workforce that strengthens our workplace culture and elevates our ability to serve our clients.

Breakdown of Black, Indigenous, and people of color (BIPOC) CLA family members

ETHNICITY	2020	2021	2022	2023	% GROWTH 2020 TO 2023
American Indian or Alaska Native	13	16	16	20	54%
Asian	306	446	564	642	110%
Black or African American	199	263	320	378	90%
Hispanic or Latino	279	368	504	555	99%
Native Hawaiian or other Pacific Islander	12	13	17	14	17%
Two or more races	87	113	136	147	69%
I do not wish to answer	76	88	120	140	84%
Grand total	972	1,307	1,677	1,896	95%



OUR PROMISE TO OUR PEOPLE



*This chart follows the Equal Employment Opportunity Commission reporting categories. Included in people of color are: Asian, Hispanic or Latino, Black or African American, two or more races, American Indian or Alaska Native, Native Hawaiian or Pacific Islander.



OUR PROMISE TO OUR PEOPLE

Virtual belonging communities

CLA's nine VBCs allow family members to connect in a deeper way, not only as colleagues, but as human beings.

All CLA family members are welcome to join any VBC they feel will deepen their understanding of others.

VBC highlights:

- Military connections VBC awarded Richonda Pelzer the Paul J. Wood award
- Parents and guardians VBC awarded Belinda Roberts and Brandt Self the 2023 Working Parents of the Year award
- Pride VBC led efforts to introduce the option to self ID gender identity in employee profiles



OUR PROMISE TO OUR PEOPLE

In 2023 a pilot VBC mentorship program was introduced as an extension of our industry mentorship program to provide targeted resources to our VBC members.

Engagement in CLA's VBCs continues to grow with more than 2,000 family members now participating in at least one of CLA's nine VBCs:





210

Family members who have memberships and/or attended conferences across diverse professional networks

\$600,000+

Invested in our diverse professional network engagement

OUR PROMISE TO OUR PEOPLE

Diverse professional networks

Building relationships with diverse professional networks is an integral part of developing and sustaining a diverse workforce. We team up with our VBCs to build and maintain these connections, and this past year we invested in engagement across multiple professional networks serving diverse business communities.

CLA maintains relationships with the Association of Latino Professionals For American (ALPFA), Ascend, and the National Association of Black Accountants (NABA) through local memberships, regional and national conference presence, and connecting CLA family members with these organizations.

- Served as a silver sponsor for the ALPFA convention, where Una Familia VBC members attended
- Hosted a Spectrum Live webcast presented by NABA
- Served as the Wellness Sponsor during NABA's 52nd annual conference and members of our Sankofa VBC attended
- Members of our CelebrAsian VBC attended the national Ascend conference



Diversifying our supplier base

We continue, formally and informally, to grow a supplier base representative of the communities we serve. Our supplier diversity program started in 2020 and CLA now works with more than 160 diverse suppliers:

SUPPLIER DIVERSITY SPEND***	#
Minority business enterprise	60
Women business enterprise	66
Small business*	248
Veteran-owned business	23
Women-owned small business	27
Economically disadvantaged women-owned business	6
Disadvantaged business enterprise	19
Self-certified disadvantaged owned business	80
Small business association	5
Service-disabled Veteran	9
Disabled	10
ACDBE**	1
AbilityOne	4

*Business at least 51% owned and controlled by socially and economically disadvantaged U.S. citizens.

**Airport Concession Disadvantaged Business Enterprise

*** Supplier business type terminology established by the Minority Business Development Agency

CLA's diverse supply spend averages 9% which is up from 4.5% in 2021 when we began tracking diverse supplier spend.



OUR PROMISE TO OUR COMMUNITIES





“Any organization that receives a grant through our family grant process must be nominated by a CLA family member — this helps us make sure we are connecting with and supporting organizations we know are important to the CLA family. I love how we are committed to truly knowing and helping our communities and take our lead from them.”

— SAUNDRA BEATTY
 DIRECTOR OF EMPLOYMENT PRACTICES
 CLA FOUNDATION BOARD CHAIR

OUR PROMISE TO OUR COMMUNITIES

CLA Foundation and community engagement impact reaches new heights

At the heart of our community relationships is our people living the CLA Promise: to know you and help you.

As individuals and as one CLA family, we give generously to improve the lives of others, and it all begins with the CLA Foundation.

Across our firm, CLA comes together to provide financial help to worthy causes in our communities, and we give freely of our time to the causes closest to our hearts. The CLA Foundation raised and granted more than \$2.6 million in 2023 to support organizations nominated by the CLA family that align with education, employment, and entrepreneurship.



“It’s great for team building, camaraderie, enjoying the beautiful outdoors of Colorado, and of course, supporting a good cause.”

— PAUL WILSON, SIGNING DIRECTOR
 ON COMMUNITY SERVICE AND A RECENT FUNDRAISING MOUNTAIN CLIMB



OUR PROMISE TO OUR COMMUNITIES

Community give back

CLA family members give back in our communities in ways too numerous to count.



2023 brought more than 200 give back events in local offices and eight national give back events. Here's some of what we did:

- Established the Community Chair network across all 130 offices that focuses on building local connections and delivering impact in every community where a CLA office is located
- During our Connect, Inspire, and Grow Conference, CLA served two organizations in Nashville, Tennessee: The Store and ShowerUp Nashville, collecting over 8,000 donated items totaling an estimated \$33,000
- CLA built relationships with HBCUs, including Georgia State University, North Carolina Central's Business Schools, and Bethune Cookman University (its first CLA intern starts in summer 2024)
- CLA's core work with Hiring Our Heroes connects the military community — services members, military spouses, and veterans — with the workforce through two fellowships:
 - **Corporate Fellowships:** which assist with professional training and hands-on experience for service members who are within 180 days of transitioning from service
 - **Military Spouse Fellowships:** which connect military spouses with organizations to help jump-start careers in various industries



CLA Foundation sets new records

More CLA family members nominated organizations to receive grants, more volunteered their time, and more dollars were raised than ever before, thanks to CLA family engagement.

Some 2023 highlights:

- **Strategic investment grants:** We continued to build deeper relationships with NABA, Boys & Girls Club of Uvalde, Texas, American Corporate Partners, and the Twende program at the Nashville Entrepreneur Center
- **Record-giving through our family grant cycle:** Thanks to CLA family member generosity, we granted \$1 million for the first time in our summer grant cycle

“Black Men Teach addresses teacher workforce shortage and educational equity. Forward-thinking firms like CLA help lead the way for stronger educational outcomes.”

– MARKUS FLYNN
BLACK MEN TEACH

- **Created two new grant categories:**
 - **Coordinated grants with VBCs:** Created with our VBCs to build relationships with organizations that represent groups or focus areas we know are important to the CLA family
 - **High school internship mini grants:** Members of the 2023 inaugural class of CLA high school interns nominated organizations in their communities: \$5,000 grants were awarded to [Dress for Success Charlotte](#) and [Corner to Corner](#) in Nashville



The CLA family helped create a safe place for children impacted by the school shooting in Uvalde, Texas by establishing a strategic grant through the CLA Foundation that provided funding to furnish the academic center of a newly created Boys & Girls Club of Uvalde.

OUR PROMISE TO OUR COMMUNITIES

CLA Foundation

2023 by the numbers:

\$2.6M+

Raised and granted in 2023

154

Family grants

5

VBC-coordinated grants

3

Strategic investment grants

2

Grants awarded to organizations nominated by CLA high school interns

150

Volunteers

100%

Owner giving in 2023

“With the CLA Foundation’s support, we are championing equity by opening access to policy making and public service to the next generation of leaders of color.”

– KALIA XIONG, PROGRAM MANAGER
CITIZENS LEAGUE



OUR PROMISE
TO THE FUTURE





OUR PROMISE TO THE FUTURE

Investing in our future

At CLA we see the future for our firm and for the profession.



In 2023 we launched a paid high school internship program, one of the first in the nation, to show the next generation of leaders the world of accounting, and to guide CLA in ways to reach and recruit the next generation of the CLA family. Sixty students across 15 CLA offices took part in the eight-week summer internship that provided them with hands-on experience in the world of accounting, audit, wealth management, and more.

“High school students have more career options available to them than ever before and we believe it is vital to provide them with a glimpse into the professional services world at CLA.”

– **BRYON REINHART**
CHIEF BUSINESS OFFICER



“I think about accounting differently now and I’m sure that anybody coming into the experience will also think differently about it as well.”

– **MADISON HUBBARD**
HIGH SCHOOL INTERN



OUR PROMISE TO THE FUTURE

Sustainability is inherently built into our everyday work at CLA. It's critically important to everything we do, not simply a campaign or initiative.

We are constantly reviewing processes, especially as a growing firm, to evaluate opportunities to reduce our environmental footprint. The future we envision for our firm — and our people — requires more vocal leadership from us now, and we are prepared to lead.

We're also helping our clients to embrace the concept of sustainable succession within their own businesses as we strive to make a positive impact on the world.



“Sustainability is a way of life, a way of doing business, and a way to become a substantiable succession-based firm. Our endeavor is to seamlessly blend sustainability into our firm culture, value system, and provide strategic approaches to our clients and communities.”

— **SRIKANTH IYENGAR**
DIRECTOR
CLA SUSTAINABILITY TEAM MEMBER



OUR PROMISE TO THE FUTURE

Creating meaningful change

CLA is dedicated to reducing long-term greenhouse gas emissions and is focused on successfully achieving its short-term milestones. By meeting our annual targets, we propel ourselves closer to our overarching objective of sustainable carbon emission reduction.

Throughout the past year, CLA has implemented various initiatives that are yielding positive results, and we are consistently exploring new avenues to create meaningful change. We view sustainability as an exciting and transformative journey, and while our progress is encouraging, we know there's still much work to be done.

2023 sustainability actions

Lowering office energy consumption

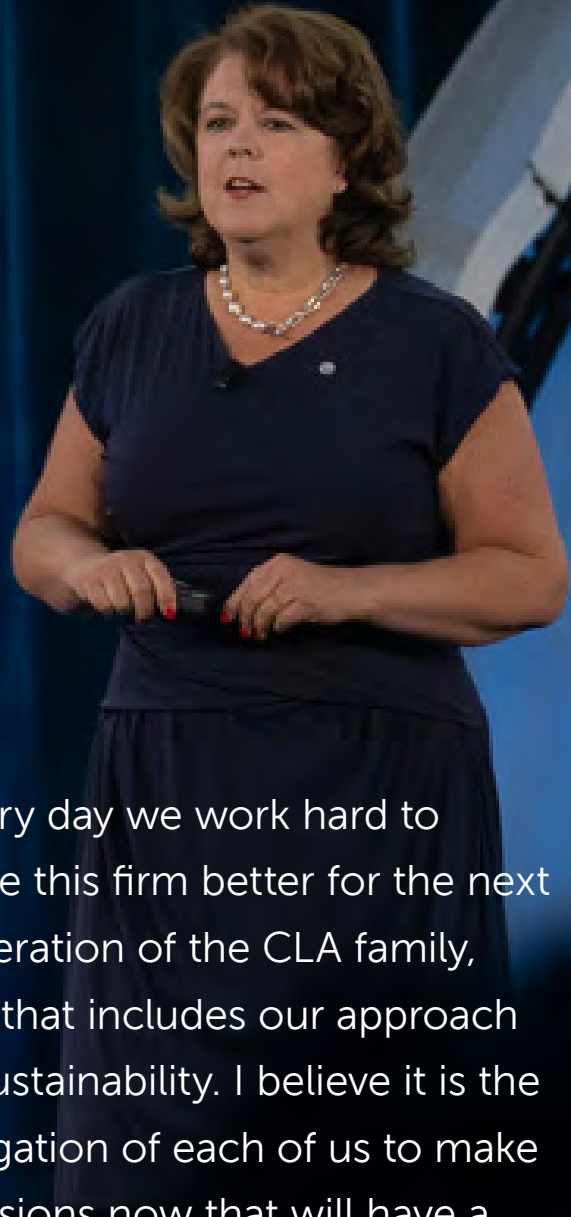
We've seen improved energy efficiency through implementing motion-sensor lighting, reusable cutlery, promoting carpooling, and establishing guidelines for office space usage.

Fostering sustainability awareness

There is a strong focus on raising sustainability awareness within our organization. We achieve this through industry-level analysis of ESG practices, in-depth articles providing valuable insights on key aspects of sustainability, as well as surveys and social media campaigns. Our goal is to translate awareness into active participation and share these insights with our clients.

Encouraging supplier engagement in sustainability

CLA recognizes that achieving meaningful progress in sustainability requires collective action across all areas of our business. Therefore, we have extended invitations to our suppliers to join us on our sustainability journey. We understand that their involvement is crucial in making a lasting and well-rounded impact on sustainability.



"Every day we work hard to make this firm better for the next generation of the CLA family, and that includes our approach to sustainability. I believe it is the obligation of each of us to make decisions now that will have a positive impact on the planet in the years to come."

— CATHY CLARKE
CHIEF CULTURE OFFICER





We'll get you there.

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