

CLA Promise Report

*Serving the heartbeat
of the country*

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When is a promise more than just words? When we deliver for our clients, for our people, and for our communities day in and day out.

At CLA, our promise is to *know you and help you*. It is simple, to the point, but also very powerful. We don't believe in transactions, we believe in connection, in understanding, and in purpose. Our promise is the foundation of our daily commitment to you and your community.

With more than 9,000 professionals, about 120 offices across the country, and a global presence, CLA has always been deeply embedded in our communities, right next to our clients. In 2025, we deepened our investment in serving you by strengthening personal connections where we live and work, recognizing that truly understanding your goals starts with being part of your world.

We know that the heartbeat of our country is found in its business owners, leaders, entrepreneurs, civic organizations, and nonprofits, the people and groups who drive our economy forward. That's why we're dedicated to walking alongside you, offering guidance shaped by firsthand knowledge of your local challenges and ambitions. Our teams are woven into the fabric of your communities, allowing us to anticipate needs, deliver tailored strategies, and celebrate your successes as our own.

This past year, we continued to invest in smarter tools and practical innovation to help you make decisions faster and with greater clarity, while remaining true to our independent, succession-driven model. By fostering collaboration across disciplines and putting Impeccable Client Service™ into action, every interaction — from proactive meetings to integrated solutions — reflects our commitment to reliability, transparency, and genuine collaboration.

We continued to invest in our CLA family, creating more learning and development opportunities, opening our first Connection Center, expanding our CLA Academy and keeping our promises — advancing our professionals and continuing to hire across the firm. And we're proud to be the largest firm in America that does not offshore work. Thank you for trusting us to be by your side as you shape what's next. We look forward to another year of serving you, knowing you, and building the uncommon results that matter for your business and for the communities we all call home.

All the best,
Jen Leary, CEO



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CONNECTION CENTER

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Serving our clients



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Always putting our clients first — and bringing the best of CLA

Our clients are at the heart of everything we do. In a year defined by change, we invested aggressively in what matters most to them: **people** and **technology** that deliver clarity, speed, and confidence, bringing the full strength of CLA to every interaction.

Across the firm, we continued executing our multi year digital vision — including our \$500 million commitment to strategies that modernize how we work and how clients experience our services. These investments span platforms, data, and automation, all designed to make engagements more seamless, secure and provide deeper client insight.

We also advanced client-facing tools that simplify collaboration, securely share information, manage requests, and connect with the right advisor, thereby reducing friction and accelerating outcomes. It's a practical expression of Impeccable Client Service™: fewer hurdles, faster answers, and a more connected experience.

Most importantly, we are continually investing in talent, building teams with the industry depth, advisory perspective, and technology fluency to help clients navigate what's next. When we say we put clients first, we mean we're aligning the full power of CLA behind their goals, and showing up with independence, curiosity, and collaboration every single day.

Thank you for trusting us. We're honored to walk alongside you and bring the best of CLA to you, now and in the years ahead.



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OUR CLIENTS

We serve the heartbeat of our country

Our clients are the heartbeat of the country. They innovate, employ, serve, and solve real world challenges every day. Their work shapes local economies and strengthens the fabric of the nation, and we are honored to walk alongside them.

With more than 250,000 active clients across industries and communities, we see firsthand how opportunity grows when people are empowered with clarity, guidance, and practical strategies. Whether supporting a global enterprise, a start up entrepreneur, a school district, or a family, planning for the future, we are committed to helping clients make informed decisions that propel their goals.

Their success fuels our purpose, and together, we build a stronger, more resilient economy for all.

255,700+	Active clients
131,200+	Private households served
27,900+	Clients engaging outsourcing capabilities
14,800+	Nonprofit organizations served
10,700+	Health care organizations served
7,900+	Clients engaging wealth advisory capabilities
7,700+	Clients engaged in global capabilities
6,900+	Financial institutions served
5,000+	Clients engaging employee benefit plan capabilities
4,400+	Government organizations served
690+	Higher education organizations served



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OUR CLIENTS

Innovation and technology leadership and client strategies

CLA's inaugural Future is NOW Conference brought together 700 clients and friends for two dynamic days of insights and connection.

From thought-provoking sessions on technology, AI, and workforce transformation to inspiring keynotes to networking and connection, the event equipped participants with tools to thrive in a rapidly evolving business landscape. By fostering collaboration and sharing strategies for digital transformation and sustainable growth, the conference reinforced CLA's commitment to anticipating client needs and delivering Impeccable Client Service™ in an era of unprecedented change.

CLA is taking our NOW Conference to more communities in 2026, focusing directly on client value interaction. With our new Connection Centers in Minneapolis, Charlotte and Phoenix, we are excited to bring the NOW Conference directly to you!

OUR CLIENTS

CLA Global

Impact and recognition

Spanning 14,000 professionals across 200+ offices, CLA Global enables cross-border service and knowledge sharing while strengthening global ties through increased joint client service and inspired career experiences. CLA Global TS earned the Silver Award for Work-Life Harmony in Singapore.

Global collaboration and innovation

The CLA Global Conference (October 2025, Orlando) united leaders to drive client growth and tech innovation. April's Tech and Innovation Exchange (New York) spotlighted AI, automation, and collaborative investments across member firms.

Global mobility and talent development

CLA Global expanded its mobility program, offering secondments abroad and hosting U.S. colleagues. These experiences fostered cultural exchange and professional growth.



CLA Global continues to grow, adding two strategic new members in 2025: in Qatar and Morocco. CLA now has 19 Global Network firms and 37 Global Alliance firms.

We also held our first Tech and Innovation Exchange in NYC, bringing together Global members from around the world.

The second annual CLA Global Conference was held in Orlando in October.



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OUR CLIENTS

CLA Global U.S. Alliance

The **CLA Global U.S. Alliance** brings together a community of independent, entrepreneurial accounting and advisory firms across the United States that share a commitment to strong client relationships, local market insight, and collaborative problem-solving. While each firm maintains its own identity and culture, Alliance members are connected through shared values, an abundance mindset, and a common goal: strengthening one another through the exchange of ideas, resources, and experience.

In **2025**, the CLA Global U.S. Alliance experienced significant momentum, welcoming **30 new member firms** and expanding to **37 firms nationwide**. This growth reflects rising interest among U.S. firms in a flexible alliance model that supports collaboration, learning, and access to broader capabilities—while preserving independence and local ownership. As the Alliance continues to grow, it is deepening its ability to serve middle-market clients across the country through stronger connections, shared innovation, and collective experience.



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CLA LLP (United States) | S&W (United Kingdom) | S&W (Ireland)
| CLA Global TS (Singapore) | CLA Global TS (Malaysia) | CLA
Global TS (China) | dhpG (Germany) | CLA Slovakia (Slovakia) |
CLA Czech Republic (Czech Republic) | CLA Global Indus Value
Consulting (India) | BSWP (Germany) | BTR Sumus (Germany)
| Cordes + Partner (Germany) | LTS (Germany) | MRT Tax
(Germany) | Prior (Germany) | RTW Revisions (Germany) | SE
Unit (Germany) | Gonzalez Espinosa y Asociados SC (Mexico)
| Smart Solutions CPA (United States) | Archipel Tax Advice
(Netherlands) | Christianson PLLP (United States) | CLA Mexico
(Mexico) | CLA Brazil (Brazil) | Ludwig & Maldener (Luxembourg)
| CLA Malta (Malta) | Riedweg & Partner AG (Switzerland) | Cora
Consulting (Georgia) | Simbula (Bulgaria) | CLA Saudi Arabia |
CLA Romania (Romania) | CLA Turkey (Turkey) | CLA UAE (UAE) |
CLA Expact (Morocco) | Harrington, Langer, & Associates (United
States) | Enestvedt & Christensen (United States) | Myslajek,
Kemp, & Spencer (United States) | TDT CPAs and Advisors (United
States) | Henjes, Conner & Williams (United States) | McClanahan
and Holmes (United States) | Nicola-Yester (United States) |
Kellogg & Sovereign Consulting (United States) | Steward, Martin,
Dudley & Webb (United States) | CLH, CPAs & Consultants (United
States) | TYS (United States) | Rohloff Associates (United States)
| International Wealth Tax Advisors (United States) | RitzHolman
LLP (United States) | BluOcean Cyber (United States) | VRS
CPA (United States) | SGC (United States) | Wojeski & Company
(United States) | CLA Qatar (Qatar) | Rogers & Company (United
States) | KMH (United States) | TRP Sumner (United States)



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Serving our people



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Leaning in for our CLA family in a changing marketplace

At CLA, our culture isn't something we talk about — it's something we live. We call ourselves a family for a reason. Family listens. Family leans forward. Family leads with heart. In 2025, that spirit continued to define us, and it remains the foundation on which we will keep growing.

What is great about CLA is that it is a place where careers flourish and where people feel genuinely seen, supported, and inspired to do their best work. This is the CLA way: leading with courage and care, and living Impeccable Client Service™ not only in how we serve our clients, but in how we treat one another.

We believe meaningful work happens in meaningful spaces. We invested in inspiring office environments designed to enhance real human connection. Our spaces are built to bring people together, spark collaboration, and strengthen relationships, reinforcing what matters most: the power of being present with one another.

Our commitment to each other guides how we lead. Even as market conditions shifted in 2025 we advanced nearly 900 colleagues, welcomed more than 700 interns and associates and stayed true to our strategy not to offshore. We chose stability over shortcuts and people over expediency.



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OUR PEOPLE

Our great place to work

Our culture is our superpower

At CLA, our culture is showing up for one another and for our clients every day. We build connection, creating a place where people feel known, supported, and inspired to do high quality work. We ask, we learn, and we follow through.

And we have been rewarded for who we are. Whether it is being certified a Great Place to Work, named a best employer for working parents or a best employer for company culture, we take great strides to live and support our values. Through surveys, pulse checks, listening sessions, career coach conversations, and everyday feedback, our CLA family tells us what’s working and where we can do better. We turn that input into action so our people can grow faster and feel more connected.

CLA is a great place to build an inspired career!



OUR PEOPLE

Our culture and belonging

Virtual belonging communities (VBCs)

9 VBCs to connect family members across spectrums to learn, grow, and prosper. We engage, connect and inspire one another by listening and encouraging belonging across CLA.

Professional business partnerships

Four organizations you can join: ALPFA, Ascend, NABA, and Disability:IN.

These connections support family member-led engagement with broader professional networks and help strengthen community.

Common interest groups

Five common interest groups available to CLA family members, offering welcoming spaces for individuals who share similar life journeys or common values.



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Our family members' inspired careers:

9,300	CLA family members
2,343	People joined CLA
1,235	Declared a new industry
900+	Advanced to leadership positions
340	Alumni rejoined CLA
282	Advanced or transitioned to director path
159	Advanced or transitioned to principal path
149	Pursued mobility opportunities
88.3%	Retention rate

OUR PEOPLE

Our inspired careers

At CLA, keeping our promises means investing in our people, at all times, through all economic conditions.

In 2025, we remained steadfast in our commitment to creating inspired careers. Our CLA family continued to grow, develop, and discover new ways to lead and contribute. This past year, we doubled down on building skills that makes our people future ready, deepening knowledge, and expanding our learning and development experiences that help every individual build confidence and purpose in their work, unlocking opportunities at every career stage. We listened, encouraged curiosity, supported mobility, and provided our CLA family has a clear path.

Our belief in inspired careers isn't a slogan; it's a responsibility we hold to each other. We focus on helping every CLA professional find the intersection of their strengths, passions, and long term aspirations — because when people are inspired, they create meaningful impact for clients, colleagues, and communities.

Inspired careers are shaped through connection, mentorship, trust, and a firmwide belief that every person deserves a career that energizes and fulfills them. This year, we continued to live that belief boldly.



OUR PEOPLE

Advocating for pathways to the profession

Across the country, CLA has been actively advocating for a stronger, more sustainable future for the accounting profession by helping reshape the pathways to CPA licensure.

Working alongside state CPA societies, regulators, and advocacy organizations, our professionals are supporting legislative and regulatory changes that expand mobility and modernize licensure requirements, all while preserving the rigor, integrity, and public trust that define the CPA credential. These efforts reflect our belief that the profession must evolve to meet the realities of today's workforce and the needs of the communities we serve.

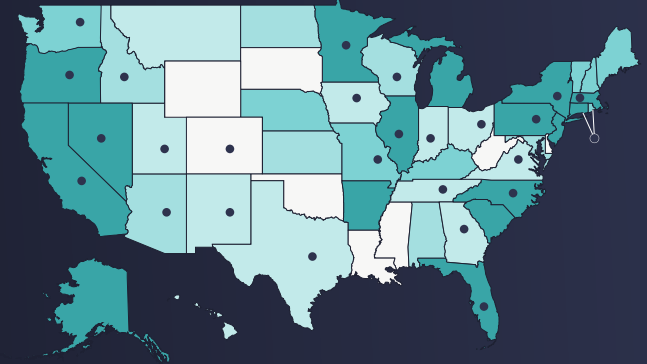
In 2025, more than 20 states enacted statutory or rule changes to introduce additional pathways to licensure, creating greater flexibility for aspiring CPAs and removing unnecessary barriers to entry.

By advocating for thoughtful, inclusive pathways to licensure across the country, we are investing not only in the next generation of CPAs, but also in the businesses, nonprofits, governments, and communities that rely on them every day.



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- CLA Advocacy
- Expected to pursue in the future
- Seeking change in 2025
- Changed law in 2025
- Publicly supported additional pathways



OUR PEOPLE

People development

Professional development at CLA means developing our people *and* their teams to deliver on the Promise. That's what it means to be locked in with purpose. And it's what we mean when we say *Lead well*.

The continuous development of our CLA professionals is ongoing from day one. Across CLA, 4,649 instructor-led sessions, both in person and virtual, empowered our people to grow through dynamic topics like Caring Conversations, Accountability, and High Performing Teams. Because at CLA, leadership is not just a milestone; it's a journey we pursue together. We began a journey of reimagining and investing in the development of our CLA family members.

- Naming a new chief people officer, Kirthi Mani
- Redeveloping Learning and Development to become People Development and naming a new managing director of People Development, Omar Rosario, to build out our CLA University
- Advancing toward a fully skills-based organization with the reimagining of our competency model and ongoing implementation of role-based skills taxonomies
- Implementing CLA University advanced learning technologies to identify and close key skills gaps through personalized learning plans
- Supporting and engaging a new cohort through our CLA Academy
- Preparing the latest class of future leaders through our Promise Leadership Series (PLS)





OUR PEOPLE

CLA Academy

In 2025, CLA Academy continued to transform career pathways through its earn-and-learn model, welcoming new cohorts and celebrating significant milestones.

The program graduated its second cohort in October, bringing the total to 23 graduates since launch, all of whom secured full-time roles at CLA. Each participant completed a 12-week immersive experience combining classroom learning, mentorship, and real client work — equipping them with practical skills and confidence to thrive in professional services.

This year's success underscores CLA's commitment to Inspired Careers, creating opportunities for individuals without traditional finance backgrounds while strengthening our talent pipeline. By investing in hands-on training and inclusive development, CLA Academy helps our teams prepare to deliver innovative, client-focused strategies today and in the future.



OUR PEOPLE

Mobility desk

144 CLA family members pursued mobility opportunities in 2025 – not just in the U.S., but through our CLA Global offices as well – through our enhanced mobility desk, supported by streamlined tools for exploring mobility-eligible roles, relocation assistance, and career coaching resources.

These success metrics reflect our commitment to inspired careers – empowering our people to grow, adapt, and thrive in roles that align with their aspirations while strengthening the knowledge we bring to clients.



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OUR PEOPLE

Live well

Building habits that power health, connection, and success.

When we build daily habits that emphasize moving our bodies, pausing to recharge, connecting meaningfully, nourishing well, and managing stress, we show up stronger for our clients, our teammates, and our families. Guided by a licensed clinical mental health professional and a certified nutrition and fitness professional, the Live Well team equips and coaches the CLA family to put these practices into motion, strengthening a culture where well-being fuels success.

TRLumph Movement Challenge

On June 14, Global Wellness Day, nearly 1,500 CLA family members joined the second annual TRLumph Movement Challenge, choosing activities like running, walking, hiking, swimming, and cycling. The event highlights how regular movement boosts health, engagement, and community connection.

Learning, educational and experiential opportunities

Live Well delivered 18 CPE-eligible hours through LC Vista on stress management, movement, and nutrition, helping team members integrate healthy habits into daily life. Beyond formal learning, the team hosted 40+ interactive sessions nationwide, reinforcing CLA's commitment to well-being as a driver of performance and success.

Wellness works

In June 2025, CLA's wellness team launched Wellness Works — a central hub for wellness news, resources, and initiatives to support family members in their health journey. The monthly Wellness Works newsletter offers tools and inspiration to nurture physical, emotional, social, and financial well-being.





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Serving our communities



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2020 CLA Triumph on All



OUR COMMUNITIES

CLA Foundation invests in our future



2015

CLA Foundation established

962

Grants since 2015

\$16.5M+

Granted since 2015

\$3.6M

Granted in 2025

186

Grants awarded in 2025

\$1.5M

Given through the
Strategic Impact Fund

14

Virtual Belonging Communities
Fund grants made in 2025

\$2M

Given through the
Community Action Fund

Connecting diverse networks to create career opportunities through
education, employment, and entrepreneurship



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OUR COMMUNITIES

Employee-driven philanthropy

The CLA Foundation is a private 501(c)(3) foundation funded solely by donations from CLA employees and owners and does not accept grant proposals from outside organizations — all grant nominations originate from employees.

Special programs and recognitions

- **Paul J. Wood Award** — Two CLA family members were honored with grants totaling \$2,000 for their exceptional contributions to military communities.
- **Strategic Impact Fund** — Continued collaboration with Scholarship America, providing \$15,000 scholarships distributed across CLA office communities, and earned the Irving Innovation Award for student-first program design.
- **Highlighted grantees** — Examples include: Big Brothers Big Sisters of Southern Arizona (\$14,000), Easterseals Central Illinois (\$11,500), Peoria School District 150 Foundation (\$10,000), Tazewell County Resource Center (\$13,000), and Urbana Neighborhood Connections Center (\$15,000)



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Looking Ahead in 2026

In 2026, we are poised to build on the momentum of this past year with clarity, confidence, and a renewed commitment to creating opportunities for our clients, our people, and our communities.

The year ahead will bring new possibilities — guided by continued innovation, strengthened relationships, and a firmwide focus on staying agile and future ready. We are investing in our people, accelerating digital transformation, expanding learning pathways, and empowering teams with tools and insights that amplify impact. The dynamic needs of our clients will continue to shape our strategy, and we will meet those needs with the same combination of experience, curiosity, and collaboration that defines the CLA experience.

The power of our fiercely independent partnership, succession driven model, and emphasis on personal connection position us well for what's next. In 2026, we will continue to show up with purpose, champion the heartbeat of our country, and strengthen the communities we are proud to serve. We will continue to be a job creator in the United States, because we care deeply about our country and our communities.

The promise we make — *to know you and help you* — is not just the foundation of our past. It is the engine of our future. And as we move into the next year, we remain dedicated to creating meaningful opportunities that help people thrive and shape a better tomorrow.



Wherever you're coming from, we're right there with you.
Wherever you're going, we'll get you there.



CPAs | CONSULTANTS | WEALTH ADVISORS