

# Topel Forman's Culture Guide

# Table of Contents

Welcome

Time Off & Flexibility

Charity & Engagement

Equity & Inclusion

Benefits

Professional Opportunities

Vision & Values

# WELCOME



At Topel Forman, we believe in empowering our employees to utilize personalized opportunities for professional development. Here, you won't just have a job; you'll have the opportunity to hone your expertise, exemplify your unique skills, and nurture your personal passions.

We are committed to fostering a supportive community where every member of our firm is not just talented but also passionate and enthusiastic about providing our clients the highest quality of service. Building lasting relationships is at the core of our values. We embrace innovation and change, encouraging our employees to develop and grow alongside us.

This guide provides an in-depth look into what you can expect when you choose a career at Topel Forman—a place where your individuality is celebrated, your growth is encouraged, and your commitment to excellence is the driving force behind everything we do.

## TIME OFF AND FLEXIBILITY

### PAID TIME OFF

Our generous PTO program allows employees to balance their personal and professional lives. A minimum of 25 days per year is available to eligible employees. Time off can be used for any reason, including vacation, illness, and personal time.



Group at Allies Museum Event, 2024

### PARENTAL LEAVE

Welcoming a child to your family is one of the most joyful experiences in life, and we want you to be able to enjoy and adjust. Whether you are a biological parent, adopting, or fostering, eight weeks of parental leave are available, starting day one of employment.



Denver Office, 2024

### FLEXIBLE SCHEDULING

Core hours - 10:00 a.m. - 3:00 p.m.  
Hybrid office/remote work options  
35 Hour work week  
Busy season gradual hour increase

### HOLIDAY OF CHOICE

Beyond our seven firm holidays, we allow you to take two days off to celebrate whichever holidays are important to you.

### HOLIDAYS

New Years Day  
Memorial Day  
Independence Day  
Labor Day  
Thanksgiving  
Day After Thanksgiving  
Christmas

# CHARITY AND ENGAGEMENT

## BIRTHDAY DONATIONS

Happy birthday to you! Every year on your birthday the firm will donate \$100 to a charity of your choosing.



Feed My Starving Children, 2023

## CHARITABLE GIVING

We support our communities, and we want to help you support yours. Our at-discretion giving program allows you to contribute to a charity of your choice, and the firm will make a matching contribution.



Anti-Cruelty Society Volunteering 2023

## WELLNESS

Our wellness committee is comprised of creative and dedicated employees who have a pulse on what people in the firm want and need.

Events include:

- Fitness
- Mindfulness
- Community
- Self-care
- Nutrition
- Guest speakers



Veteran's Support 5k, 2024



Allies Mexican Art Museum, 2024

## RECOGNITION PROGRAM

We have a program that offers employees opportunities to acquire Topel Forman branded gear ranging from Yeti mugs to fleece zip-ups. The program also incorporates employee-to-employee recognition opportunities.

## PAID VOLUNTEER TIME

Our firm sponsors volunteer events, paid volunteer hours, and opportunities to participate in firmwide charity challenges.

## ORGANIZATIONS WE SUPPORT

- Meals on Wheels
- House of Good Shepard
- Feed My Starving Children
- Shriners Children's Hospital
- Anthony Rizzo Family Foundation
- Wounded Warriors
- Greater Chicago Food Depository
- Metro Caring
- Young Americans Fiancial Center For Education
- Trevor Project
- Arab American Women Business
- Peoples Resource Center
- Love Fridge Denver
- Center on Colfax

We are open to supporting all organizations that are important to our employees.

## EQUITY & INCLUSION

### ALLIES

We are committed to disrupting unconscious bias and recognizing issues surrounding perception, ingrained biases, and patterns that can be detrimental to a thriving workforce. We provide engaging internal training to elevate awareness and spark meaningful conversations.

### WOMEN'S EMPLOYEE RESOURCE GROUP

Our mission is to provide a safe space to encourage, enable, and facilitate women's active involvement and success in the Topel Forman workplace by educating ourselves and providing resources to support and mentor women to achieve their full potential, thrive, and believe in their ability.



Illinois CPA Society Forum For Women, 2024



Special Olympics, 2024

**AWARENESS**  
**BELONGING**  
**RESPONSIBILITY**  
**INCLUSION**  
**EQUITY**  
**DIVERSITY**

# BENEFITS

## Medical

### Blue Cross Blue Shield

80% Paid by the Firm

- High Deductible PPO
- PPO
- HMO (IL residents only)

## Dental

### Guardian Dental

100% Paid by the Firm

- DPPPO
- DHMO (IL residents only)

## Vision

### EyeMed

100% Paid by the Firm

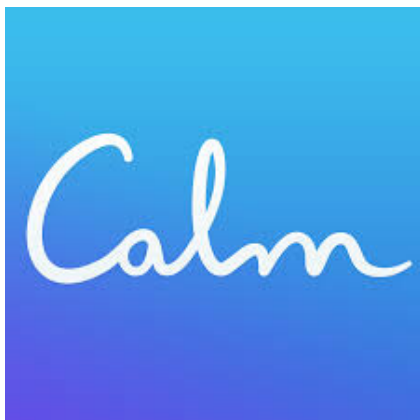
## Mental Wellness

100% Paid by the Firm

Calm App Subscription

## ADDITIONAL BENEFITS

- Telemedicine
  - Employee Assistance
- CALM App Subscription
- Short Term Disability
- Long Term Disability
- Life Insurance
- FSA/HSA Accounts
  - Contribution Matched HSA
- Anniversary Gift Program
- Cancer, Accident, Critical Illness Insurance
- Wellness or Fitness Reimbursement
- Wellness Challenges
- Regular Summer Events
  - Chase Corporate Challenge
  - Summer Party
- In Office Meals, Certain Days
- Identity Theft Monitoring Service
- Commuter Benefits
  - Parking/Transit Stipend
- Student Loan Refinancing
- Retirement Savings
  - 401K
  - Roth IRA
  - Safe Harbor Contributions



# PROFESSIONAL OPPORTUNITIES

## INTERNSHIP PROGRAM

Our Audit and Tax internships offer hands-on experience for what it is like to be a first-year associate at a top 200 accounting firm.

### Your Work Will Matter!

- Projects and daily assignments are real work that will directly benefit our clients.

### You Will Develop Your Skills

- Technical skills
- Professional skills
  - Time management
  - Balancing responsibilities
  - Professional communication
- Software
- Department concepts
- Real-time feedback to apply to future work

## INNOVATION

Innovation is paramount to our success and automations will help make us future ready.

## LEARNING AND DEVELOPMENT

Focused on ensuring everyone has a clear path to success in their respective position at the firm.

## REFERRAL PROGRAM

We are always looking to expand our talented team and offer a robust bonus program for successful employee referrals. For additional information, please reach out to our HR department.

## CPA BENEFITS

A critical part of achieving success in Public Accounting is obtaining your CPA license. We have designed a comprehensive benefit program to support you in your efforts. Topel Forman covers the following:

- **Exam Prep Materials - Not Time Dependent**
- **Exam Fee**
  - 1st-time registration fee and 1 round of exams
- **CPA License Fee**
- **AICPA Membership**
- **State CPA Societies**
- **Exam Leave**
  - One PTO day per section of the CPA exam (10 max)

To recognize your achievement, the firm offers a bonus for passing the CPA Examination to eligible employees.

- Bonuses are paid according to a schedule, based on your years of regular employment with TF.

## ENROLLED AGENT BENEFITS

Topel Forman partners with Surgent to provide exam preparation materials for the EA exam, as well as covering exam and certification fees. One day of PTO will also be granted per exam day (6 max).

## PROFESSIONAL OPPORTUNITIES

### FOCUS GROUPS

Our focus groups provide a chance to help boost your expertise and make you a more valuable advisor to our clients. We serve clients across all aspects of tax compliance including cryptocurrency reporting, estate planning, and more.

### INDUSTRY NETWORK



Topel Forman is a member of a robust professional network that aids in industry connections, partnerships, and education. As an independent member firm of Moore North America, Inc. (part of the Moore Global Network), employees of our firm have access to programs and events that focus on development.

### AICPA AND STATE CPA SOCIETIES

For all employees who hold their CPA, the firm covers basic membership dues associated with the AICPA and the state CPA society of the employee's worked-in state.

The firm also supports the AICPA Foundation, which was established to advance accounting as a learned profession and promote its future through accounting education and outreach, scholarships and fellowships, and diversity and inclusion.

accountingTODAY

2024 **Regional Leaders**



Allies Outing, 2024

**TOP  
WORK  
PLACES**  
2022-2023

**Chicago Tribune**

Topel Forman, LLC is a 2023 Top Workplace!  
2 Years Running

## VISION & VALUES

- **Flexibility**

- Contributions are valuable, no matter the location
- Professional development time
- Flexibility during non-busy seasons
- Unplug: you don't have to be available 24/7

- **Integrity**

- Doing the right thing
- Setting realistic expectations and following up.
- Adhering to rules and procedures

- **Respect**

- Treating everyone with consideration
- Solutions-oriented conversations
- Active listening
- Being mindful of others' time
- Recognizing and rewarding contributions

- **Excellence**

- Continuous self-improvement in technical skills, leadership, and professional development
- Proactive communications
- Leading by example
- Embracing and encouraging change



Partner Group, Summer Outing 2022

**Inclusive  
Culture**

**Innovative  
Environment**

**Engaging  
Work  
Experience**

**Flexible  
Work  
Scheduling**

**FLEXIBILITY | INTEGRITY  
RESPECT | EXCELLENCE**