

Future Horizons in Finance for SaaS Industry

Do More with Less Using AI for Business Success

KNOWLEDGE

Learning Objectives

Identify how to set a data foundation and automate workflows to grow and scale.

Recognize the importance of defining SaaS metrics such as CAC and customer retention.

Evaluate how AI can automate transaction processing, as well as how companies are now viewing their systems data strategies to support it.

CPE INFORMATION

Program Level: BASIC
Recommended CPE: 1
Field of Study:
Information Technology

WELCOME

Today's Presenters



Scott Schimberg

Partner
Armanino Advisory LLC



Justin Mitkus

Director
Armanino Advisory LLC



Chuck Bunting

Financial Industry Advisor,
Tech & Media
Workday

WHAT WE'LL DISCUSS

Today's Agenda

- The Fundamentals of AI
- AI Use Cases
- Choosing the Right Technology
- Emerging Workforce Skillsets
- Closing and Q&A



ARMANINO

Firm Overview

Count on Armanino to think strategically and provide sound insights that lead to positive action. We address not only your compliance issues, but your underlying business challenges.

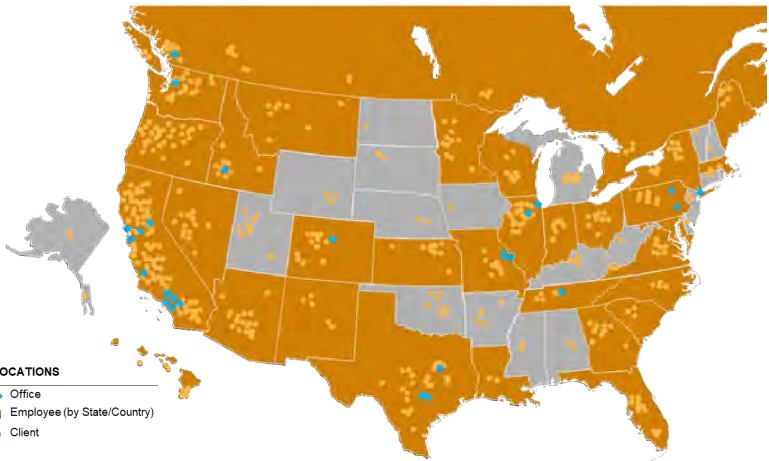
Purpose

To be the **most innovative** and **entrepreneurial firm** that makes a **positive impact** on the lives of **our clients, people and our communities.**

Snapshot

2500+ Employees
Team Members in 23 States
18th Largest CPA & Consulting
Largest Niche: Technology

Locations



- CALIFORNIA**
 - San Ramon
 - San Jose
 - San Francisco
 - Los Angeles (2)
 - Irvine
 - El Segundo
 - Woodland Hills
 - San Luis Obispo
 - Torrance
- WASHINGTON**
 - Bellevue
- COLORADO**
 - Denver
- IDAHO**
 - Boise
- TENNESSEE**
 - Nashville
- TEXAS**
 - Austin (2)
 - Dallas
- ILLINOIS**
 - Chicago
 - Naperville
- MISSOURI**
 - St. Louis
 - St. Charles
- PENNSYLVANIA**
 - Philadelphia
 - Scranton
- NEW YORK**
 - New York City
- CANADA**
 - Vancouver

AFFILIATE COMPANY



RECOGNITION & AWARDS



TRUSTED EXPERTISE

Workday Services Partner



Deploy leading accounting, finance and analytics systems to enable your organization's growth and digital transformation.

As a **Workday Services partner**, we bring extensive industry and finance leadership expertise to help you **strategize and build a plan for success**. We can act as your full transformation guide – taking your plans through from inception to deployment to continuous optimization.

PRODUCTS

Workday
Adaptive
Planning

Workday
Financial
Management

Workday Human
Capital
Management

Workday
Prism
Analytics

Workday
Accounting
Center

FUTURE OF FINANCE

When was AI Invented?

SC

When was AI invented



The concept of artificial intelligence (AI) has been around for centuries, but the term "artificial intelligence" was coined by John McCarthy in 1955. McCarthy, along with Marvin Minsky, Nathaniel Rochester, and Claude Shannon, is considered one of the founders of AI.

AI as a field of study and research really began to take off in the mid-20th century with the advent of digital computers. Early AI research focused on tasks such as game playing and problem-solving. The development of neural networks in the 1950s and 1960s also contributed to the growth of AI as a field.

In the years since its inception, AI has gone through several waves of advancement, with periods of intense research and development followed by periods of reduced funding and interest, known as "AI winters." Currently, we are in a period of rapid progress in AI, with advancements in machine learning, deep learning, and other techniques leading to the development of AI applications in various fields.

FUTURE OF FINANCE

Machine Learning vs Deep Learning



Compare and contrast machine learning vs deep learning for AI in a table



Certainly! Here's a comparison table highlighting the differences between machine learning and deep learning in the context of artificial intelligence:

| Aspect | Machine Learning | Deep Learning |
|------------|--|---|
| Definition | Subset of AI where algorithms learn patterns from data to make predictions or decisions. | Subset of machine learning using neural networks with multiple layers (deep neural networks). |

Neural Networks & Humans

SC

compare and contrast Neural networks to humans in a table



| Aspect | Neural Networks | Human Brain |
|--------------------|---|--|
| Architecture | Composed of interconnected artificial neurons in layers. | Comprises approximately 86 billion neurons connected in a vast network. |
| Learning Process | Learns from data through mathematical optimization algorithms. | Learns from experience, sensory input, and interaction with the environment. |
| Learning Abilities | Capable of learning complex patterns from vast amounts of data. | Can learn from various sensory inputs, adapt, generalize, and exhibit creativity and reasoning. |
| Processing Speed | Can process vast amounts of data quickly, especially with GPUs. | Human brain processes information more slowly but excels at parallel processing and complex tasks. |
| Energy Efficiency | Requires significant computational power and energy resources. | Remarkably energy-efficient, consuming a fraction of the power of artificial neural networks. |
| Flexibility | Flexible in adapting to different types of data and tasks. | Highly adaptable, capable of learning new tasks without requiring extensive reprogramming. |
| Fault Tolerance | Can degrade gracefully and continue functioning with damaged units. | Exhibits remarkable fault tolerance, allowing for continued functioning even with damaged neurons. |

| | | |
|------------------------|--|---|
| Creativity and Emotion | Lacks creativity and emotional intelligence. | Displays creativity, emotional intelligence, empathy, and complex emotional responses. |
| Self-awareness | Lacks self-awareness and consciousness. | Humans possess self-awareness, consciousness, and the ability to introspect. |
| Hardware | Implemented on digital computer hardware, such as CPUs and GPUs. | Biological and complex, made up of interconnected neurons and synapses. |
| Parallel Processing | Highly parallel, allowing for the simultaneous processing of data. | Human brain excels at parallel processing, enabling multitasking and rapid decision-making. |
| Learning Efficiency | Requires substantial amounts of labeled data for effective learning. | Humans can learn from sparse and unlabeled data, often requiring fewer examples to grasp concepts. |
| Adaptability | Requires manual adjustments in architecture and hyperparameters. | Human brain adapts and learns without manual adjustments, continuously improving its performance. |
| Limitations | Limited by available computational resources and data quality. | Limited understanding of consciousness and the human mind, and susceptible to various cognitive biases. |

It's important to note that while artificial neural networks have made significant advancements, they are far from matching the complexity, efficiency, and adaptability of the human brain in various cognitive tasks. The comparison highlights the current state of technology in neural networks relative to the capabilities of the human brain.

Neural Networks & Humans

SC

Tell me what is better Neural networks for AI or the human brain and why in a table.



| Aspect | Neural Networks for AI | Human Brain |
|--------------------|---|--|
| Processing Speed | Can process vast data quickly, especially with specialized hardware like GPUs. | Slower processing speed compared to artificial neural networks, but excels at parallel processing and complex tasks. |
| Learning Abilities | Capable of learning complex patterns from large datasets. | Highly adaptable, capable of learning from diverse sensory inputs, exhibiting creativity, reasoning, and emotional intelligence. |
| Energy Efficiency | Requires substantial computational power, making them energy-intensive. | Remarkably energy-efficient, consuming significantly less power for similar tasks. |
| Flexibility | Flexible in adapting to different types of data and tasks with appropriate architectures. | Highly adaptable, capable of learning new tasks without extensive reprogramming. |
| Creativity | Lacks intrinsic creativity; generates patterns based on existing data. | Demonstrates genuine creativity, innovation, and the ability to create entirely new concepts and ideas. |
| Problem Solving | Excellent at pattern recognition and solving specific, well-defined tasks based on training data. | Exceptional problem-solving abilities, especially in complex, ambiguous, and real-world scenarios. |

| | | |
|------------------------|--|--|
| Emotional Intelligence | Lacks emotional intelligence and empathy. | Exhibits complex emotional intelligence, empathy, and the ability to understand and respond to human emotions. |
| Adaptability | Requires manual adjustments in architecture and hyperparameters. | Adapts and learns without manual adjustments, continuously improving its performance. |
| Understanding | Lacks true understanding; processes data based on statistical patterns. | Possesses genuine understanding, consciousness, and the ability to reason and introspect. |
| Reliability | Reliability depends on data quality, quantity, and the model's complexity. | Highly reliable, capable of making accurate judgments even in uncertain and novel situations. |
| Contextual Learning | Limited in contextual understanding; lacks true contextual awareness. | Exhibits profound contextual understanding, connecting disparate pieces of information to form a comprehensive understanding of the world. |

In summary, while artificial neural networks are powerful tools for specific tasks and have made significant advancements, they still fall short in many aspects compared to the complexity, adaptability, and intelligence of the human brain. The human brain's ability to understand, reason, learn from sparse data, exhibit creativity, and demonstrate emotional intelligence gives it a unique advantage over artificial neural networks. However, it's important to note that artificial neural networks have their own strengths, particularly in handling vast amounts of data quickly and performing specific tasks based on patterns in the data. The choice between the two depends on the specific task and the goals of the AI application.

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Key Takeaways



AI concepts have been around for a long time.



Waves of improvements have occurred over time; we are in an improvement wave now.



Matching the use cases to the right type of AI is important.

- Goals and outcomes expected
- Large amounts of data vs small data sets
- Consistency of data quality

Safe Harbor Statement

This presentation may contain forward-looking statements for which there are risks, uncertainties, and assumptions. If the risks materialize or assumptions prove incorrect, Workday's business results and directions could differ materially from results implied by the forward-looking statements. Forward-looking statements include any statements regarding strategies or plans for future operations; any statements concerning new features, enhancements or upgrades to our existing applications or plans for future applications; and any statements of belief. Further information on risks that could affect Workday's results is included in our filings with the Securities and Exchange Commission which are available on the Workday investor relations webpage: www.workday.com/company/investor_relations.php

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Customers who purchase Workday, Inc. services should make their purchase decisions upon services, features, and functions that are currently available.



Office of the CFO

AI Use Case



Automated & Scalable

OCR scanning



Streamline Close

AI as a detective



Predict Outcomes

Recommend and Reconcile

Challenge

AI Use Case

Impact

Automated & Scalable Financial Operations

- Manual anomaly detection
- Limited automation
- Manually matching invoices to payments

- Journal Insights
- Supplier Invoice Automation
- Customer Payment Matching

- Improve Finance efficiency and scale
- Improve compliance and risk mitigation
- Decrease time-to-close

Continuous and Company-Wide Planning

- Extended planning cycle due to anomalies
- Accurate and predictive plans are increasingly difficult

- Planning Anomaly Detection
- Outlier Reporting
- Machine Learning Forecaster

- Increase forecast accuracy
- Increase planning efficiency
- Reduce time to plan

Proactive Spend Management

- High volume of active contracts
- Spend category challenges
- High volume of documents to scan
- Manual audits of expense reports

- Contracts Semantic Search
- Spend Category Recommendations
- Invoice Scanning with OCR
- Expense Protect

- Improve Finance efficiency and scale
- Proactive controls and compliance
- Improve vendor negotiation and visibility benefits

AI in Workday



Touchless Transactions

Where Procure to Pay - **Supplier invoice automation**

What Upload and scan invoice, automatically route

Why Eliminates manual data entry, **saving time** and **reducing cost**



Streamline Close

Where Record to Report - **Journal Insights**

What Proactively surface journal anomalies as they occur

Why AI becomes the detective, **giving you time back**



Predicative Processes

Where Contract to Cash - **Customer payment application**

What Machine learning recommends the invoices to match

Why **Eliminates manual matching**

Focus on strategic review of data and analytics, not on manual processes



Supplier Invoices

Create Supplier Invoice

Supplier Invoice (empty) Invoice Number - new -

Invoice Information

Company

Global Modern Services, Inc. (USA)

Supplier

Office Depot

Remit-To Connection

Office Depot - Default Remit-To

Currency

USD

Invoice Date

09/22/2023

Invoice Received Date

MM/DD/YYYY

Control Total Amount

0.00

Terms and Taxes

Payment Terms

2% 10, net 30

Discount Date

10/02/2023

Due Date

10/22/2023

Due Date Override

MM/DD/YYYY

Default Payment Type

Check

Override Payment Type

Reference Type

Originating Country

Payment Purpose

Invoice Reference Information

Ship-To Address

One Bryant Park, Bank of America Tower New York, NY 10044 United States of America

Handling Code

On Hold

☐

Supplier Document Received

☐

Supplier's Invoice Number

External PO Number

Referenced Invoices

Invoice Lines

Tax

Currency Rate

Prepaid Details

Additional Fields

Attachments

Work Queue Information

Process History

Invoice Lines 1 Item

| Order | *Company | Item | Item Description | Supplier Item Identifier | Purchase Item | Spend Category | Ship-To Address |
|-------|------------------------------------|------|------------------|--------------------------|---------------|--|---|
| | Global Modern Services, Inc. (USA) | | | | | <div><div>Search</div><div><div>Recommended</div><div><div>Hardware - Computers</div><div>Mobile Office Assets</div><div>Office Furniture & Equipment</div><div>Computer Accessories</div><div>Office Supplies</div></div></div></div> | One Bryant Park Bank of America Tower N York, NY 10044 United States of America |

Submit

Save for Later

Cancel



Supplier Invoice OCR Scanning

View OCR Supplier Invoice

| | | | |
|--------------------------------|---------------------------------|---------------------------------|------------------------------------|
| OCR Supplier Invoice | | Override Company | Global Modern Services, Inc. (USA) |
| Scanned Attachment | ProTech-Invoice_PO-4288 GMS.pdf | OCR Suggested Company | (empty) |
| Supplier Invoice | Supplier Invoice: 22897 | OCR Supplier | (empty) |
| Created by Worker | Teresa Serrano | OCR Supplier Invoice Number | 421010623 |
| Assigned to Worker | (empty) | OCR Invoice Date | 01/06/2023 |
| Scan Status | Success | OCR Due Date | (empty) |
| OCR Has Failed | | OCR Invoice Total Amount | 500.00 |
| OCR Start Time | 01/10/2023 09:26:39.208 PM | OCR Header Tax Amount | 0 |
| OCR End Time | 01/10/2023 09:26:53.578 PM | OCR Freight Amount | 0 |
| OCR Duration (sec) | 14 | OCR Payment Terms Text | Net 30 |
| OCR Possible Duplicate Invoice | (empty) | OCR Purchase Order Text | PO-4288 |
| | | OCR Purchase Order | PO-4288 |
| | | OCR Suggested Purchase Orders | PO-4288 |
| | | OCR ML Suggested Purchase Order | (empty) |
| | | Currency | USD |
| | | OCR Currency | USD |

View Cash Application Insights

한글

CompanyGlobal Modern Services, Inc. (USA)

CurrencyUSD

Payments With Recommendations3 items

| Payment | Company | Transaction ID | Payment Date | Payment Type | Payment Reference | Customer | Application Status | Currency | Payment Amount | Recommended Invoices | Dismiss | Review |
|---------|------------------------------------|----------------|--------------|--------------|-------------------|-------------------------|--------------------|----------|----------------|---|---------|--------|
| Q | Global Modern Services, Inc. (USA) | 3564 | 12/09/2022 | Wire | 11905 | Dunder-Mifflin | Unapplied | USD | 31,800.00 | Customer Invoice: 11905 | Dismiss | Review |
| Q | Global Modern Services, Inc. (USA) | GMSL-7 | 01/07/2023 | Check | | Initech | Unapplied | USD | 1,250.00 | Customer Invoice: 13721 Customer Invoice: 13723 Customer Invoice: 13728 Customer Invoice: 13732 Customer Invoice: 13733 | Dismiss | Review |
| Q | Global Modern Services, Inc. (USA) | GMSL-2 | 01/01/2023 | Check | | North Tahoe Power Tools | Unapplied | USD | 2,175.00 | Customer Invoice: 13718 Customer Invoice: 13719 Customer Invoice: 13720 Customer Invoice: 13722 | Dismiss | Review |



Journal Anomaly Detection

Correct and Dismiss Journal Line Anomalies

6400:Legal & Service Fees

Impacted Debit Amount

196,000.00 USD

Impacted Credit Amount

0.00 USD

Dismissed Anomalies

0

Confirmed/Corrected Anomalies

1

Filters

Company

Global Modern Services, Inc. (USA)

Reporting Currency

USD

Period

2022 - Dec

Time Period

Current Period YTD

1 item

| | View Journal | Transaction | Accounting Date | Company | Anomaly Reason | Current Worktags | Recommendation | Debit Amount | Credit Amount | Currency | Journal Source |
|--------------------------|-------------------------|-------------|-----------------|------------------------------------|----------------|---|--------------------------|--------------|---------------|----------|------------------|
| <input type="checkbox"/> | <div>View Journal</div> | 22869 | 12/12/2022 | Global Modern Services, Inc. (USA) | Cost Center | <div><div>⚠</div><div>Cost Center: 72100 Field Marketing</div><div>Location: San Francisco</div><div>Region: US - West</div><div>Spend Category: Legal & Auditing Fees</div><div>Supplier: Baker McKenzie LLP</div></div> | Cost Center: 53000 Legal | 196,000.00 | 0.00 | USD | Supplier Invoice |

Create Journal

Confirm Anomalies

Dismiss Anomalies

Cancel



The Future

Collections Letters

Page 3 of 9

What You See

The message portion of the collection letter is generated in the email preview panel.

What To Do

Next, you want to include past invoices as part of the letter.

A. Scroll down

B. Click the Checkbox to Include Past Invoices



AI Data Sources

Content generated using the following secure data sources:

- Invoices
- Key Message
- Message Tone

Create Collections Letter

Email Template
Collection Letter

In the past 5 weeks, Collection Letter resulted in an average 88% increase in payments.

Message Tone
Level 2 - Very Urgent

Level 1 - Very Urgent is recommended based on amount paid due and 2 previous emails.

\$184k is 30% due

Key Message
Personalized email

For example, "This would be great to have this resolved ahead of signing the new contract next week."

☒ Include Past Due Invoices in Message
☐ Include Invoice Copies as Attachments
☐ Include Original Invoice File Attachments

Send Letter

Cancel

From
dave.brown@roundhillconsultingcollections.com

To
S-A Brown@crosscorp.com, jennifer.murphy@crosscorp.com

Subject
Follow Up: Outstanding Payment for Past Due Invoices

ROUNDHILL CONSULTING

The spirit of business, redefined™

Dear Pamela,

I trust this email finds you well. I wanted to follow up on our conversation from September 8th. I understand that you have transitioned into a new position, and I appreciate that you are still getting up to speed on this payment delay.

I want to take a moment to reiterate the matter of the pending payment for the last 5 invoices. While I recognize that your responsibilities have shifted, it's important to ensure that we maintain a seamless continuation of our business relationship. Our commitment to delivering quality services remains unchanged, and I am confident that this adjustment will not hinder the prompt resolution of outstanding financial matters.

I kindly request that you address the pending payment at your earliest convenience to ensure that there are no disruptions in the flow of our collaboration. Clearing this outstanding amount will enable us to continue our partnership on a positive note and will contribute to the ongoing success of both our organizations.

I truly value the partnership we have built and your dedication to our shared objectives. I look forward to a swift resolution of this matter and continuing our collaboration in your new capacity. Thank you for your attention to this request, and please feel free to contact me if you have any questions or need further assistance.

Contract Analysis

Page 3 of 10

What You See

A split screen view where you can see the highlighted discrepancy on the scanned contract and the system contract data.

What To Do

Rather than generate a proposed resolution, you click Something Else to enter a query.

Click Something Else

MENU

workday

Search

View Contract

Contract_2248_B

1 of 7

Analysis

Contract Comparison

Here is a comparison view of the contract and the end date as entered.

The discrepancy is highlighted.

Would you like me to generate a proposed resolution to correct the discrepancy?

Yes No Something else

Discrepancy Found

Here is the Bluestar Corporation contract where a discrepancy was found in the end date.

Would you like to see a comparison against the contract?

Yes No Something else

Contract Summary

workday.

ORDER FORM 00383253.0

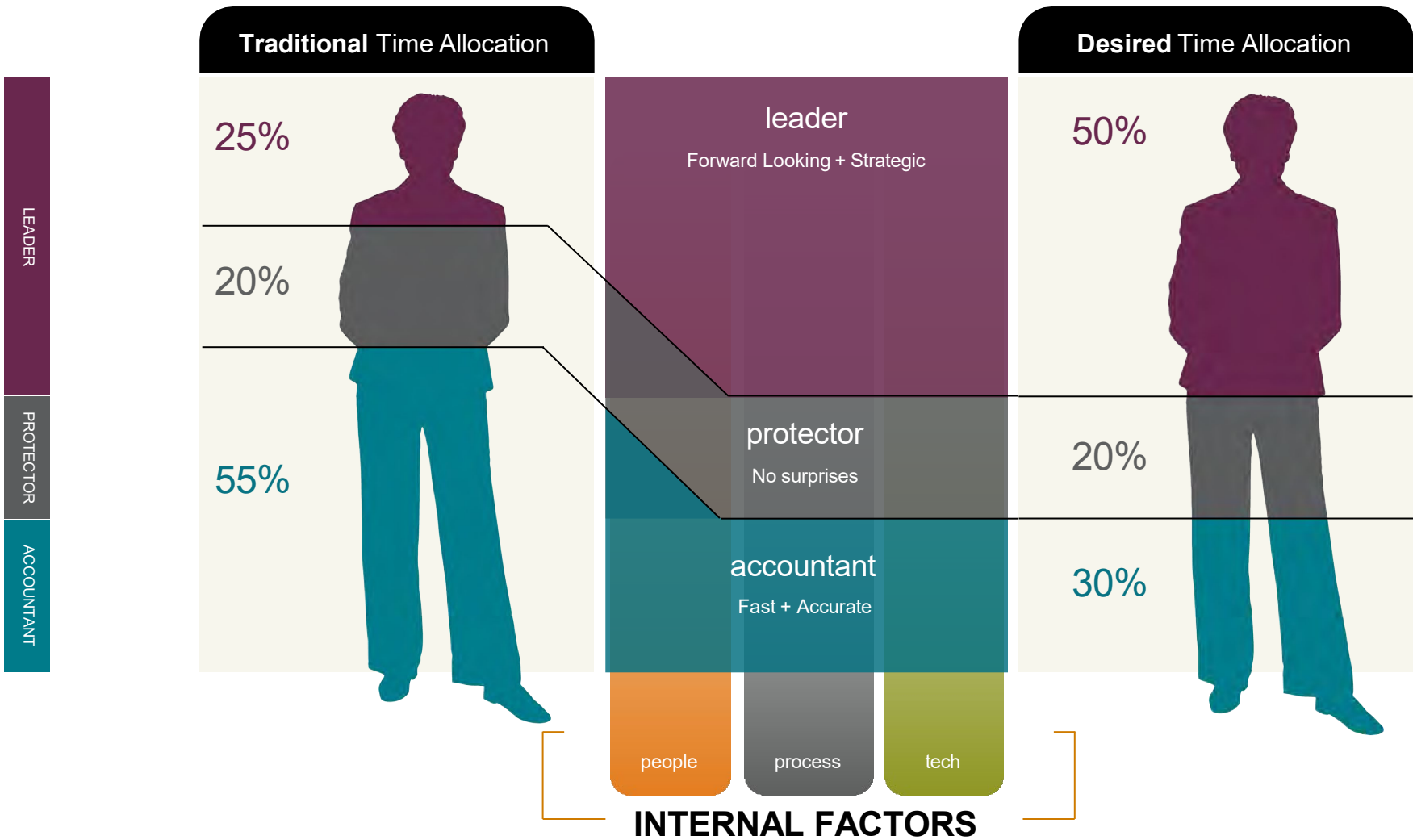
00383253.0 - Confidential

| | |
|------------------------|---|
| Customer Name | Bluestar Corporation |
| Workday Entity | Workday, Inc. 6110 Stoneridge Mall Road Pleasanton, CA 94568 |
| MSA Effective Date | See MSA executed herewith |
| Order Effective Date | The later of the dates of the parties' signatures on the Signature Document |
| Order Term | May 9, 2023 through May 8, 2026 |
| Currency | USD |
| Total Subscription Fee | 195,001 |
| Tenant Base Name | |

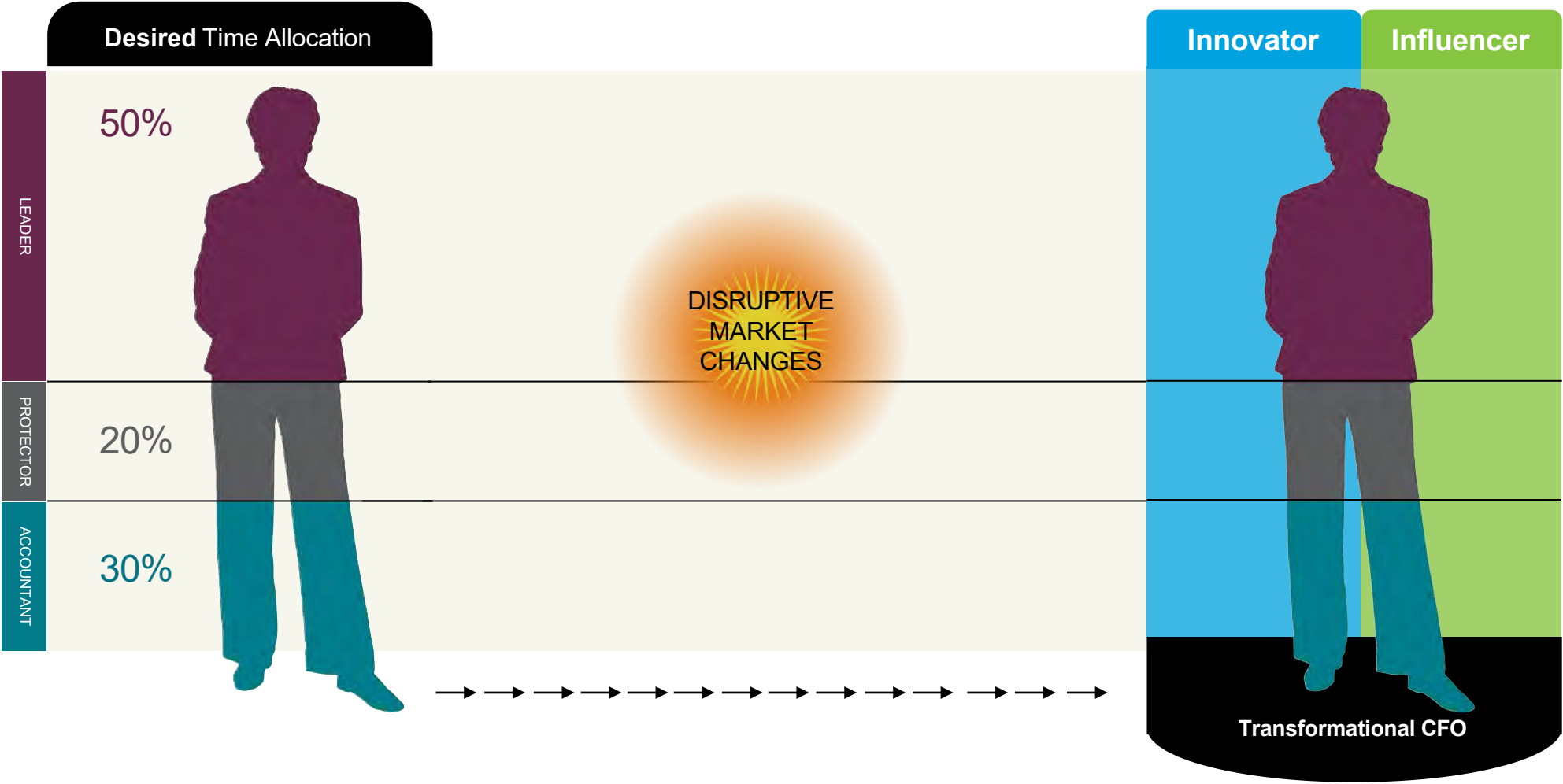
| Payment # | Payment Due Date | Payment Amount |
|-----------|------------------|----------------|
| | | |

| Category | Line Type | Line Status | Line Amount | Scheduled, In Progress, and Ready To Bill Amount | Billed Amount | Line Revenue Amount | Scheduled Deferred Revenue To Recognize | Recognized Deferred Revenue | Deferred Revenue Balance | From Date | To Date |
|----------|--------------|-------------|-------------|--|---------------|---------------------|---|-----------------------------|--------------------------|------------|------------|
| | Fixed Amount | Active | 89,760.00 | 89,440.16 | 29,719.85 | 89,190.00 | 84,648.43 | 4,211.57 | 25,408.28 | 05/09/2023 | 05/08/2027 |
| | Fixed Amount | Active | 34,287.00 | 32,844.73 | 11,422.27 | 34,287.00 | 32,600.92 | 1,687.08 | 5,795.15 | 05/09/2023 | 05/08/2026 |
| | Fixed Amount | Active | 48,791.00 | 43,134.78 | 15,567.25 | 48,792.00 | 47,298.52 | 2,493.48 | 14,153.77 | 05/09/2023 | 05/08/2026 |
| | Fixed Amount | Active | 21,873.00 | 14,581.37 | 7,280.65 | 21,873.00 | 20,614.30 | 1,067.68 | 5,232.95 | 05/09/2023 | 05/08/2026 |

CFO Evolution 2.0



CFO Evolution 2.0



FUTURE OF FINANCE

Emerging Workforce Skillsets



New set of skills in the workforce



Analyze large datasets and provide meaningful insight into the business



Building strategic relationships with the business partners and manage stakeholders



Ability to think critically and communicate



Moving away from manual, mundane work – manual data validation, updating management reports



Ability to identify opportunities and create value using technology

Q&A

Thank you for
attending!

Additional Questions?

Reach out to one of our presenters or
email us at: Experts@armanino.com

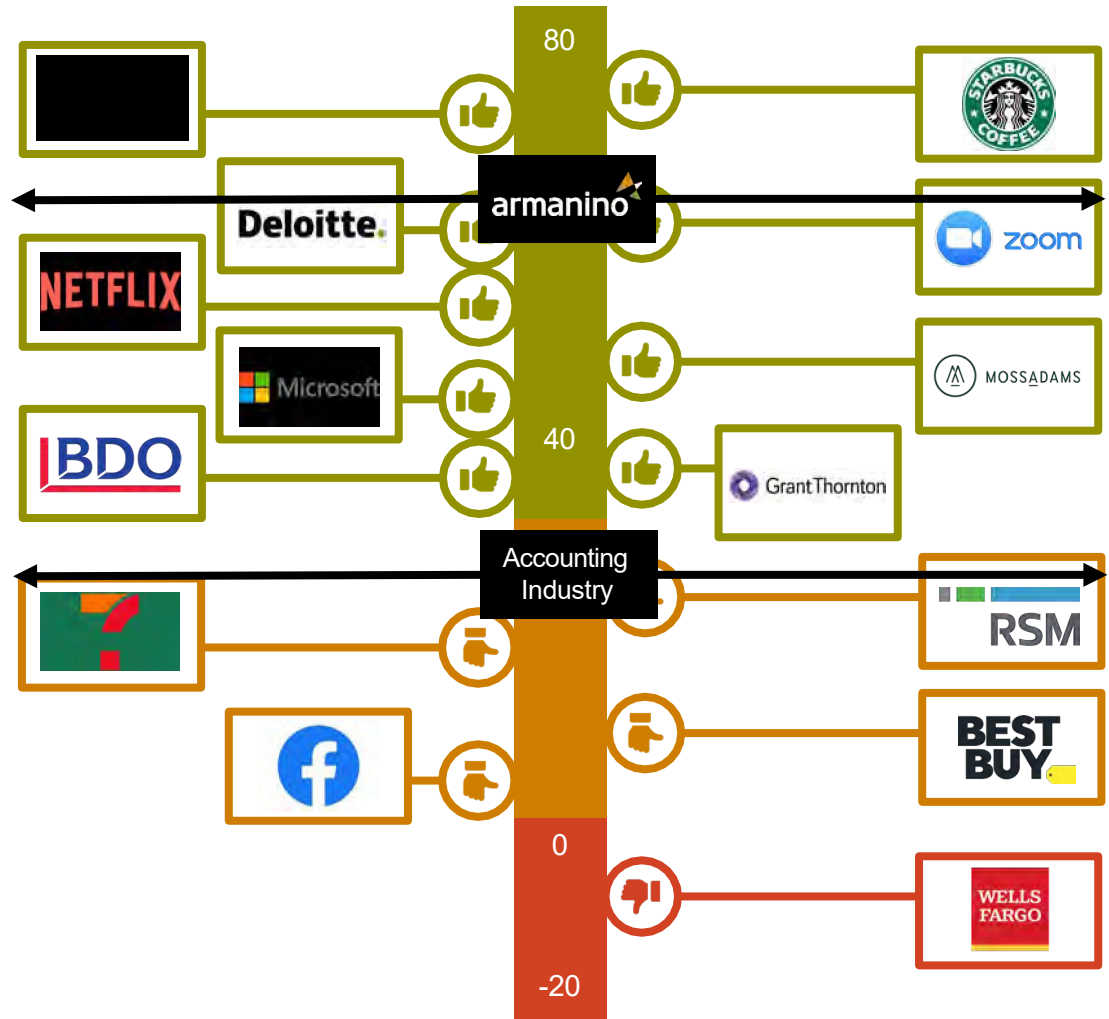


OUR CLIENTS' VIEW

We're Just What You Need

A Net Promoter® Score (NPS) is used by more than two-thirds of Fortune 1000 companies.

Armanino's NPS (68) is almost two times higher than the accounting industry average (38), and it places the firm scores closest to household name brands such as Starbucks, Peloton and Zoom.



A New and Better Way for Today and Tomorrow

Equipping you with the insights and tools needed to redefine what's possible



COMPLIANCE & REGULATORY

- Tax Planning
- Trust & Estate
- SOX
- Contract



ASSURANCE & ADVISORY

- Cybersecurity
- SOC
- Restructuring
- Revenue Recognition



STRATEGY & PLANNING

- Corporate Strategy
- Strategic Advisory
- Benchmarking
- Business Transformation



STAFFING & DEVELOPMENT

- Payroll
- Health Benefits
- Executive Search
- Interim Placement



TECHNOLOGY SYSTEMS

- ERP
- CRM
- Business Intelligence
- Managed Services



ACCOUNTING & BACKOFFICE

- Bookkeeping
- Budgeting/Forecasting
- Account Receivable
- Accounts Payable

ADDITIONAL INFORMATION

About Armanino & Our Values

ARMANINO

Additional Information on Our Values

Please explore the links below to learn more about our firm values and community outreach. From championing diversity and women leadership within the firm to committing to social and environmental change at the global level, our PVAs guide us every step of the way.



Armanino Foundation
<https://armaninofoundation.org/>



Diversity & Inclusion
<https://www.armanino.com/company/who-we-are/ideal/>



Women's Advancement
<https://www.armanino.com/company/who-we-are/womens-initiatives/>



Certified B Corporation
<https://www.bcorporation.net/en-us/find-a-b-corp/company/armanino-llp>

LIVING UP TO THE IDEAL

Diversity & Inclusion

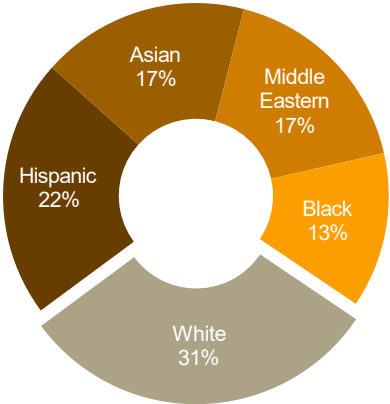
Our differences make us stronger, smarter and more innovative to truly bring the best to the table for our clients and organization.



WE'RE LEADING
TO **ACT ON**
DIVERSITY AND
INCLUSION !

CEO Matt Armanino signed the **CEO Action for Diversity & Inclusion Pledge** on behalf of the firm with a commitment to develop programs and initiatives that identify and foster opportunities for underrepresented groups led by the IDEAL committee.

Women account for **56%** of our recruiting efforts in gender and POC account for almost **70%** in ethnicity.



Nationally ranked as best Accounting firm to work for:



OUR COMMITMENT

Women's Advancement



INTERNATIONAL WOMEN'S DAY



A Bridge is a structure that actually carries a road or a path. As women move through their career journey, The Bridge provides support, connectors and a built infrastructure to help advance our women.

50%

of Armanino's newly elected partners for 2023 are women, underscoring the success of the firm's women's initiative to help women advance into leadership roles

EXECUTIVE ACCESS PROGRAM

Launched in 2018, this program connects high-potential female managers directly with firm executives to promote and drive career advancement.



PARTICIPATING IN MOVE

In partnership with the Accounting & Financial Women's Alliance, the MOVE Project challenges and equips firms and women to identify and address barriers to women's advancement.

OUR COMMITMENT

Certified B Corporation



ARMANINO HAS
JOINED THE B CORP
COMMUNITY

Armanino is using its business as a force for good. By becoming a certified B Corporation, we are accelerating a global culture shift to redefine success in business and build a more inclusive and sustainable economy.

Certified B Corporations are a new kind of business that balance purpose and profit. They are businesses that meet the highest standards of verified social and environmental performance, public transparency, and legal accountability to balance profit and purpose. We are now among other great B Corporations pledged to making a positive impact.

BEN & JERRY'S

BOMBAS

PATAGONIA

METHOD

SUNGEVITY

RUBICON

HAPPY
FAMILY

WARBY
PARKER

SEVENTH
GENERATION

DANSKO

KING ARTHUR
BAKING COMPANY

KICKSTARTER

GIVING BACK



Mission

To assist charitable organizations that create a positive impact on the lives of people in our community.



The Armanino Foundation empowers our employees to give back to the community via:

- **The Great Give**
- **Dollars for Doers**
- **Volunteer Vacations**
- **Grants**



Armanino Operates in an Alternative Practice Structure:

"Armanino" is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.