



Start your KPMG story

Your virtual guidebook





Welcome to your journey with KPMG

Congratulations on choosing to participate in KPMG's Start your Story. We truly hope you find your story with KPMG Louisville.

As you've already learned, professionals will be sharing their stories with you through virtual sessions. We encourage you to attend as many as you can, but to truly pick the sessions and the topics that are most important to you. We ask that you come with questions ready so that you can have a great dialogue with our professionals, about where they started, and why they have found such fulfillment in their day-to-day experiences at KPMG.

This virtual guidebook is meant as a tool to provide greater detail on the faces and places of KPMG Louisville. It includes the schedule of events for the week of June 1st - June 4th, as well as biographies of the individuals who will be hosting the virtual sessions. We hope that you will take the time to explore KPMG Louisville through these pages and begin to see yourself as a part of our firm and our family.

Your KPMG story starts here.

KPMG Louisville Campus Recruiting Team



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Chapter 1: A schedule of our stories



A schedule of our stories

As mentioned in your registration email, these sessions have been specifically curated to allow you the opportunity to find your story at KPMG, both in your practice of interest and in the additional opportunities that the firm provides. Please feel free to attend as many as you would like! We've divided the sessions into three categories: KPMG Culture, Audit Focused, and Tax Focused. Details on the topics and biographies of the session hosts are featured throughout the guidebook. Note that all times listed are in Eastern Standard Time. If you have not watched the KPMG firm overview, please watch prior to reviewing these offerings.

KPMG Culture — Recommended offerings for all

Firm overview – Timing varies (the webcast link can be found in your invitation)!

Our firm overview will tell the story of KPMG and give you the opportunity to get to know KPMG by the numbers and review some of our offerings. It will really help to set the scene for the rest of the week!

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Intern Panel

Tuesday, June 2 | 11:00 a.m.–12:00 p.m.

Wednesday, June 3 | 3:00 p.m.–4:00 p.m.

Catch up with our previous interns and recent new hires and hear their experiences while on the job!

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Partner Chat, Commitment to our Community, Making the Most of Mentorship

Monday, June 1 | 10:30 a.m.–11:30 a.m.

Thursday, June 4 | 1:00 p.m.–2:00 p.m.

KPMG is filled with individuals who are not only passionate about client work, but also have a strong desire to give back, whether that be through our business resource groups or through community service opportunities! Learn more about our commitment to the community through the stories of our Inclusion Council members. Mentorship is at the backbone of a successful career at KPMG, affecting professionals of all levels, from intern to partner. Learn about the power of these relationships and the impact they can have on your career.

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Go Global

Tuesday, June 2 | 10:00 a.m.–11:00 a.m.

Thursday, June 4 | 2:00 p.m.–3:00 p.m.

Have you always envisioned working internationally in your career? Hear from our professionals about how they decided to take a leap and work abroad, the logistics behind the experience, and how it has helped them in their career.

A Look at Lakehouse

Timing varies (webcast link to be provided)

This session will share more about KPMG's investment in Lakehouse, the features of the facility, and its benefits to our trainings.

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Inclusion and Diversity at KPMG

Tuesday, June 2 | 2:30 p.m.–3:30 p.m.

Thursday, June 4 | 10:00 a.m.–11:00 a.m.

At KPMG, we lead with inclusion first. We believe that building a truly inclusive culture is essential to becoming the Clear Choice. Hear from employees who have made an inclusive and diverse culture a priority in defining their KPMG story.

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Final Q & A with Primary Recruiter

Thursday, June 4 | 3:30 p.m.–4:15 p.m.

Audit-focused offerings

A Career in Audit

Monday, June 1 9:00 a.m.–10:00 a.m.

Tuesday, June 2 12:00 p.m.–1:00 p.m.

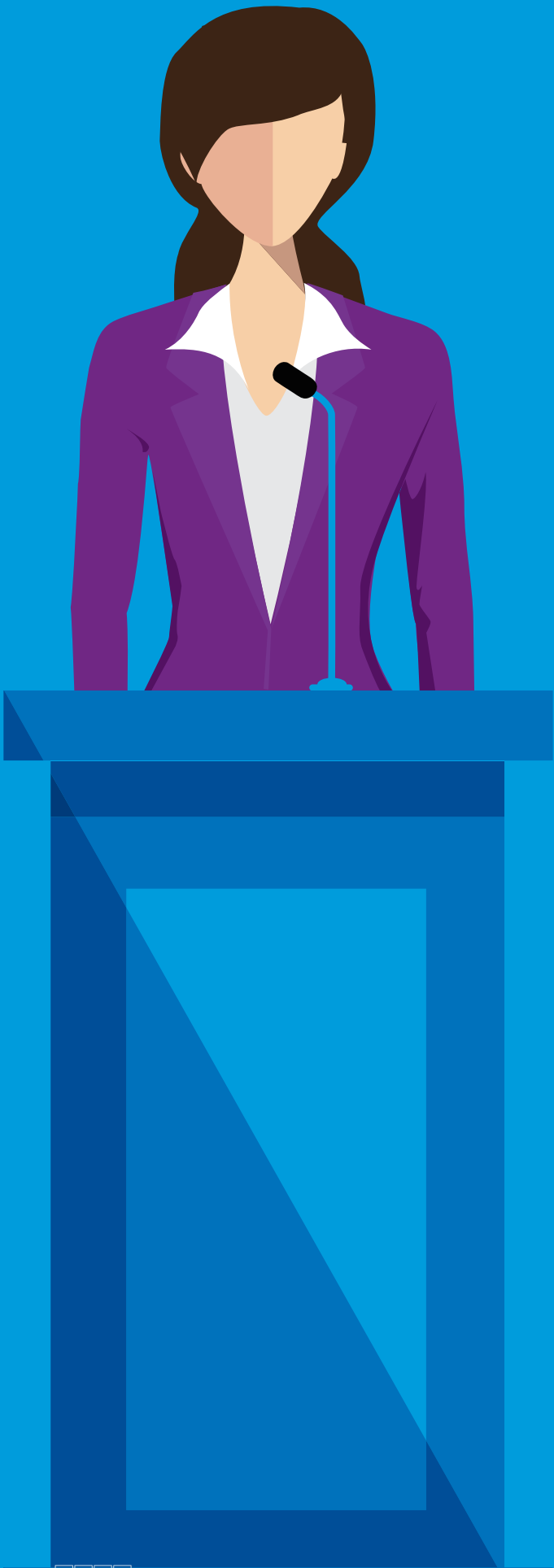
Are you ready to see where your career in audit will take you, both now and over the course of your career? A KPMG Audit Professional will share their experiences over the course of their career.

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Audit Innovation and Technology

Timing varies (webcast link will be provided)

The Audit practice at KPMG is rapidly changing with burgeoning technology, and many of our teams are adapting to a new normal. A professional heavily involved in this change will speak about KPMG Clara, the beginning of a new era for Audit, and a gateway into the digital future.



Tax-focused offerings

A Career in Tax

Monday, June 1 | 11:30 a.m.–12:00 p.m.

Wednesday, June 3 | 3:00p.m.–4:00 p.m.

Are you ready to see where your career in Tax will take you, both now and over the course of your career? KPMG Tax Professionals will share their experiences of the course of their career.

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Chapter 2: Our functions



Audit overview

Audit facts and figures

More than ever before, auditors perform work critical to the global economy and to companies and communities worldwide. Consider how:

- Big data and new advanced technologies are disrupting industries
- Increased regulations and higher reporting standards require effective financial oversight
- Capital markets need high-quality audits to invest confidently and function properly
- Real-time insights and deep analytics are necessary to compete in fast-moving markets and to manage complex enterprises
- Boards and business executives need reliable information and insight to make critical informed decisions.

If you are inspired by such important work, KPMG Audit practice may be the place for you. We are growing and seeking talented candidates who want to define the next generation of audit.

Talented professionals, like you, are critical to our success

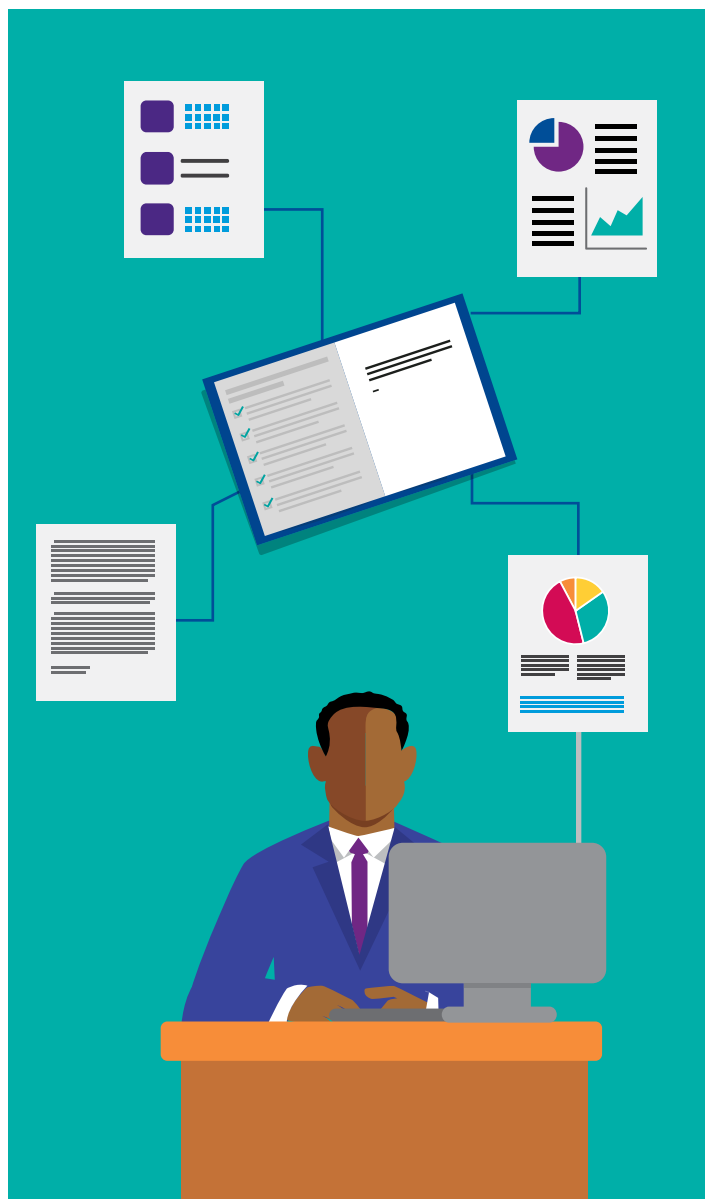
Combining knowledge and skills with leading-edge tools and technologies strengthens our ability to deliver a robust and relevant quality audit. We invest significant time, energy, and funds into developing our Audit professionals. To keep pace with the evolving operating environments, we provide blended learning curricula that bring together technology-based training options with immersive in-person classroom experiences:

- We built KPMG Lakehouse, a dedicated learning, development, and innovation facility, to provide continuous learning
- We have over 13,000 mentoring relationships across the firm; our partners and professionals are committed to fostering your growth and developing your leadership skills
- KPMG is #20 on *Consulting* magazine's Best Firms to Work For list
- KPMG is recognized by *Fortune* magazine as one of the 100 Best Companies to Work For
- KPMG is recognized as part of *Training* magazine's Top 10 Hall of Fame, an honor reserved for the handful of high-performing learning organizations.

Careers, not just jobs

KPMG Audit practice is a strong and vibrant business, giving you access to market-leading assignments at top global companies. There is a place for your skills, ideas, and interests here, along with opportunity to grow at your own pace. That means promotion when you are ready, not according to tenure or predetermined timelines. And perhaps that is why we are known for having high employee satisfaction rates and record-low turnover.

KPMG Audit practice is about opportunities to create the career you want.





Tax overview

Tax

As a constantly changing and increasingly high-profile field, Tax can offer you a surprisingly broad and engaging range of career paths. Our Tax professionals work with executives and other stakeholders at leading public and private companies, not-for-profits, and other organizations to help them implement the tax planning and compliance approaches that helps drive their organizations forward. There's no single kind of person who succeeds here. Tax is a dynamic field in which individuals with a diverse range of backgrounds, skill sets, interests, and perspectives can tackle challenging projects and build rewarding careers. To learn more about Tax, view our microsite [HERE](#).

What does it mean to work for KPMG Tax?



*"At KPMG, we recognize that **YOU** are our future and our ability to exceed the expectations of our clients depends on our Tax professionals reaching their full potential. We are all responsible for fostering an inclusive, diverse, and performance-focused culture that empowers our people to drive their own success and to become strategic business advisers, comfortable with innovation and leveraging technology to drive value in a quickly evolving, client-centric market."*

Ben Garfunkel, Chief Talent Officer, KPMG Tax Practice



People are the heart and soul of the KPMG Tax Practice. We aim to:

- **Foster** a high-performing, values-based culture in which people explore alternative career paths and experiences, working styles, and arrangements for broad and rewarding careers.
- **Create** exceptional experiences to enable their full potential and strive for personal and professional excellence.
- **Reinforce** a flexible, open, and inclusive workplace that promotes total well-being.
- **Strengthen** our agile workforce to anticipate clients' emerging needs, win in the market, and deliver our KPMG vision by engaging with the business, Tax practice, and each other.

Leadership story



Paul Fultz

Title: Office Managing Partner, Audit

Alma Mater: University of Louisville

Paul is an Audit partner who serves as the managing partner of the Louisville office and the National Restaurant Segment Leader for the firm. Paul is a Securities and Exchange Commission (SEC) Reviewing Partner, KPMG's designation for its top technical partners. He has more than 25 years of experience serving public companies.

Paul has worked with several large public and private organizations and has managed several complex global audits for organizations in a variety of industries, including consumer and industrial organizations. He has also served as engagement partner on initial public offerings (IPO) and several secondary stock and bond offerings, and has extensive experience with mergers and acquisitions due diligence and related accounting issues.

As the leader of KPMG's restaurant segment, Paul is responsible for market facing activities within the restaurant segment, including KPMG's annual Restaurant Financial Executives Share Forum. This role also includes serving as the firm's industry issues expert and for helping to ensure that information about restaurant issues (including technical accounting and auditing matters), trends, best practices and information about KPMG resources with the restaurant segment are communicated to KPMG's teams and organizations we serve.



Charles A Ritter

Title: Audit Partner

Alma mater: University of Central Florida

Charlie is an audit partner based in Louisville, KY. Charlie is also an SEC reviewing partner and has more than 24 years of experience serving large public and private companies. Previous experience includes serving as the Professional Practice Partner (Carolinas, Florida and Puerto Rico) and Orlando Office Managing Partner.

Charlie has significant experience leading global audit engagements, including experience dealing with revenue recognition, leasing, impairment, foreign currency, cross-border income tax matters and global coordination of audit teams. In Charlie's role as a professional practice partner, he was responsible for audit quality and risk management. He provided engagement teams with technical support on matters such as business combinations, consolidations, financial instruments, debt, derivatives, equity, leasing, income taxes, revenue recognition, and SEC reporting matters.



Dane Sanders

Title: Tax Managing Director

Alma mater: University of Kentucky

Dane is a Managing Director in the Business Tax Services practice with over thirteen years of experience at KPMG. He has had exposure to a wide variety of projects for a broad range of U.S., multi-national, and foreign-owned clients.

Dane has had exposure to a wide variety of projects for a broad range of U.S., multi-national, and foreign-owned clients. Dane assists with almost all aspects of the tax matters of his clients' businesses. He has prepared and reviewed income tax returns for corporations, partnerships, individuals, trusts, and non-profits. He has prepared quarterly and annual income tax provisions for tax clients and reviews income tax provisions for audit clients – under both U.S. GAAP and IFRS. He is involved in the tax research and planning processes for his clients and drafts memoranda for internal documentation and client advice.



Chapter 3: Inside look at your KPMG internship



Inside look at your KPMG internship

A KPMG internship is a terrific way to learn business skills, find a mentor, build your network, and get real-world (even global) experience before graduation. And it can often lead to a full-time job. Discover how an internship can connect you with the countless opportunities at KPMG.

Start your KPMG internship

To kick off your internship, you will participate in local office orientation during which you will receive your laptop and name badge and will complete required trainings to begin client service. Your campus recruiting team also hosts an Intern Welcome Event, where you will form bonds with other interns and meet your transitional coach for the internship, typically an associate in your chosen practice.

National Intern Training at Lakehouse

KPMG National Intern Training is the place to bring your best. And that means an exhilarating full week at Lakehouse, fine-tuning your business and people skills, taking a deep dive into your chosen practice area, and making new friends among students and KPMG professionals from all over the country. KPMG is the only one among the Big Four that offers a consistent national training experience for all Audit, Tax, Advisory, and Business Support Services interns.

Set your goals

Soon after you return from National Intern Training, you will meet with your people management leader (PML), who will act as your performance resource throughout your internship. During this meeting, you will set goals to help you maximize your internship. You will also receive feedback from your engagement teams throughout the course of your internship.

Put your skills to work

Once you return from National Intern Training, you will begin working with your engagement team and learning the ins and outs of your clients. In Audit, interns may be exposed to various industries and will have exposure to client settings and opportunities during their time at KPMG. Within Tax, you will likely be working on various clients within the group of your choice.

Get two for one

With our Build Your Own Internship Program (BYOIP), you can intern with KPMG in two practices chosen from Audit, Tax, or Advisory. One practice provides your “core” experience. The other provides your “developmental” experience in which you’ll work on various client engagements. KPMG is the only one of the Big Four to offer a national split internship program.

Celebrate your success

As your internship winds down, we invite you to celebrate your success with your PML. Take time to discuss progress made towards your goals and learnings from your internship experience.



Start your story session hosts



Dan Heekin

Audit Senior Manager

Alma mater: Miami University and University of Cincinnati

Dan is a senior manager in the Louisville office with 9 years of experience in the audit practice. His clients are primarily focused in the consumer and industrial products and retail industries.

Recently, Dan completed a 2 year international rotation with KPMG in Malta and worked with clients based out of a number of foreign jurisdictions including the UK, France, Sweden and the Czech Republic. Dan has led KPMG soft skills and technical trainings domestically and abroad under US GAAP/GAAS and IFRS/ISA respectively. He is currently a chairperson for the Employer of Choice council in the Louisville office.



Leah Lewis

Title: Senior Audit Associate

Alma Mater: Western Kentucky University and University of Louisville

I am a senior associate in KPMG's Audit practice. I have more than three years of experience providing financial statement audit and audit of internal control services. I have experience with both public and private clients among a variety of business sectors, most notably consumer goods and manufacturing.

Currently, I am the in-charge senior associate on Yum! Brands, Inc. In this role, I am responsible for overseeing the day-to-day activities of the audit which includes supervising and coaching multiple associates of different levels; coordinating with specialist teams; and communicating with key client contacts in order to meet the objectives of performing a high-quality and efficient audit.

Audit Career Panel

Tuesday, June 2 | 12:00 p.m.–1:00 p.m.



Jakson Deyer

Audit Senior Associate

Alma mater: University of Louisville

My name is Jakson Deyer and I am a senior associate in the audit practice for KPMG. I have been with the firm for five years and also completed an internship with KPMG prior to starting full-time. I have served and continue to serve a diverse portfolio of clients during my time at KPMG, including such industries as retail, manufacturing, power and utilities, and technology. I have experience with public company and private company audits as a staff member and in-charge senior.

Outside of the "normal" work requirements, I am involved in many aspects of the Louisville office and help to promote a vibrant and positive culture as a culture champion. I help to plan office wide social events and participate in sports leagues sponsored by our local office. I assist with recruiting to identify future interns and full-time employees. I am also part of our national instructor program which enables me to facilitate trainings at our new facility in Orlando on a periodic basis. I look forward to getting to know all of you and I am happy to answer any questions you may have about KPMG.



Andrea Baxter

Title: Senior Audit Associate

Alma Mater: University of Louisville

I started at KPMG as an audit intern during my junior year at the University of Louisville. I loved my internship because I felt like I was challenged, made friends on my audit teams, and got to travel to Florida and Boston. I accepted a full time offer and have been with the firm now for a little over three years. In that time, I have worked mainly on local clients, but I have also been given the opportunity to travel to work on jobs in other cities from Cincinnati to San Francisco.

The current client I am a Senior on takes up the majority of my time as it is a large, international client. I serve on our office's Employer of Choice council as the Services Chair, planning community service events for our office. This has been a great way to get involved in one of the many non-work related activities our office does to stay close. I also really enjoy playing on our office sand volleyball team in the summer and going to recruiting events in the spring and fall.

Audit Career Panel

Tuesday, June 2 | 12:00 p.m.–1:00 p.m.



Jennifer Liebert

Tax Senior Manager

Alma mater: University of Louisville and University of Denver

Jennifer is a Senior Manager in KPMG's Louisville Business Tax Services Practice, currently on rotation with KPMG's Tax Business School. Jennifer has over fifteen years of experience in providing tax compliance and consulting services to a broad range of clients, including U.S. multi national and foreign owned clients doing business as single entities or consolidated groups. Jennifer has provided a variety of services to her clients including federal and state tax return preparation and review; accounting for income taxes calculations (ASC 740) preparation and review; technical tax research memorandums on various complex domestic and foreign tax issues, just to name a few. Jennifer's experience covers a wide-range of industry sectors including manufacturing, healthcare, restaurants, chemicals, energy, farming, and financial services.

In her current role as a rotational with KPMG's Tax Business School, Jennifer develops training courses for a variety of experience levels and for multiple functional groups. Additionally, Jennifer assists our Washington National Tax Practice with training design techniques to more effectively transfer knowledge at our Tax Manager and Partner trainings. Jennifer also helps develop, manage, and maintain other performance support resources such as our Tax on Point Video Channel. Jennifer also serves as a National Instructor for KPMG teaching Tax Associates and Senior Associates at Tax Fundamentals and Tax Skills Seminar.

Tax Career panel

Monday, June 1 | 11:30 a.m.–12:00 p.m.

Wednesday, June 3 | 2:00 p.m.–3:00 p.m.



Wes Becker

Tax Senior Associate

Alma mater: Transylvania University and University of Kentucky

Wes is a Senior Tax Associate who has been with KPMG since December 2019. Wes has worked in public accounting and focused on corporate income tax for 6 years, prior to KPMG he was with other Big 4 and national firms in the Louisville area. Wes was born and raised in Louisville and has spent his career in Louisville as well. He graduated with his undergraduate degree from Transylvania University and received a Master's in Accounting from the University of Kentucky. He works mainly with large corporate clients in a variety of tax services.

Tax Career panel

Monday, June 1 | 11:30 a.m.–12:00 p.m.

Intern panel



Noah Braden

Audit Associate

Alma mater: Bellarmine University

I am an audit associate spending most of my time on the Yum! Brands public engagement. I have been with the firm for approximately nine months and have had the opportunity to work on a number of different clients in a variety of industries (retail food/drug, manufacturing, pharmaceutical, energy and regulated utilities, and equine to name a few). My first experience with the firm was when I interned the winter of 2018. I made a lot of long-time friends and had many memorable learning experiences. The internship experience assisted me significantly in my transition to a full-time associate last fall. I was able to pick back up where I left off fairly quickly and have since had the opportunity to take on many new roles and responsibilities on my team.

KPMG is an exciting place to grow as a professional in a very short period of time. With the firm you have a unique opportunity from very early on to take ownership of many responsibilities and are surrounded by individuals, from the associate level up to partner, who are actively supporting you and pushing you to be better every day. I'm looking forward to chatting with each of you and discussing some of my experiences with the firm.

Intern Panel

Tuesday, June 2 | 11:00 a.m.–12:00 p.m.

Wednesday, June 3 | 3:00 p.m.–4:00 p.m.



Austin Kennedy

Tax Associate

Alma mater: University of Kentucky

My name is Austin Kennedy, and I am a Business Tax Services Associate at KPMG. I graduated from the University of Kentucky in May of 2019 with a double major in accounting and finance. I began working as a tax associate in October of 2019, and I previously was a tax intern with KPMG during the summer of 2018. I really enjoyed my internship experience, and it prepared me well for my role as a tax associate!

In my free time I enjoy watching sports and traveling. I will be getting married in July, so wedding planning has kept me busy recently, as has studying for my final CPA exam.

Intern Panel

Tuesday, June 2 | 11:00 a.m.–12:00 p.m.

Wednesday, June 3 | 3:00 p.m.–4:00 p.m.



Kelsey Nofziger

Audit Senior Associate

Alma mater: The Ohio State University

Kelsey started at KPMG as a winter intern for audit in the Columbus, Ohio office. Upon completion of her bachelor's degree from The Ohio State University, Kelsey started full-time in the Columbus office. Kelsey spent two years in the Columbus office, primarily working in the commercial and industrial manufacturing industry, before transferring to the Louisville office in 2017. During her years in the Louisville office, Kelsey has primarily worked on the Yum Brands engagement and is now finishing her third year as a Senior Audit Associate.

Outside of audit work, Kelsey has enjoyed staying involved in the many internal opportunities KPMG has to offer. Kelsey has participated in the Business Unit Senior Council, representing the Louisville office, to convene on issues and ideas across the business unit to present to senior leadership. In the past year, Kelsey had the opportunity to attend the One Young World Summit in London as part of the KPMG delegation. At the completion of the Summit, Kelsey became a One Young World Ambassador and routinely meets with the KPMG Ambassadors to discuss the implementation of social initiatives in their respective offices. Kelsey has also been a part of 'Audit90', a group of approximately 90 women across KPMG US that participate in a year-long career development program. This program has enabled Kelsey to connect with KPMG leadership across the US and make invaluable connections. Within the Louisville office, Kelsey enjoys participating in recruiting, Employer of Choice, KPMG Network of Women, and Inclusion and Diversity events.

Intern Panel

Tuesday, June 2 | 11:00 a.m.–12:00 p.m.

Wednesday, June 3 | 3:00 p.m.–4:00 p.m.



Sam Young

Audit Associate

Alma mater: University of Louisville and University of Missouri

My name is Sam Young. I was born and raised in Louisville, Kentucky. I attended Trinity High School and graduated from the University of Louisville. I completed the Masters in Data Analytics program at the University of Missouri through KPMG. I am a part of the Audit practice and have been full-time with KPMG since September of 2019.

Since I started and throughout my internships, I have mainly served clients in the restaurant industry. I have worked on a couple manufacturing and energy clients here and there. It has been a great experience thus far with the firm. Outside of work, I enjoy spending time with family and playing golf.

Intern Panel

Tuesday, June 2 | 11:00 a.m.–12:00 p.m.

Wednesday, June 3 | 3:00 p.m.–4:00 p.m.



Chapter 4: Culture and community



Our Values

Nothing is more important than investing in our culture. It's an investment in our people, in our future, and in who we are and what we stand for.

What we believe

Integrity

We do what is right.

Excellence

We never stop learning and improving.

Courage

We think and act boldly.

Together

We respect each other and draw strength from our differences.

For Better

We do what matters.

KPMG goes global

While your career with KPMG may start at your home office, working for a firm with offices in 147 countries truly opens up the world to you. KPMG has a multitude of opportunities that allow you to experience how business operates in other countries and cultures.

Global Advantage Program

During the summer of 2019, top students from across the world traveled to Budapest, Hungary, for Global Advantage, a four-day leadership program hosted by KPMG. During this unparalleled experience, participants networked with experienced KPMG partners, as well as KPMG interns and professionals from around the world. This exciting program is designed for highly motivated students looking to gain valuable leadership skills and a competitive edge as they launch a successful career.

See highlights from the program [HERE](#).

Global Internship Program

KPMG Global Internship Program (GIP) is your chance to jump-start your global career through a four-week rotation in another country.

This is not a vacation or job shadow program. It's an opportunity for students who have already accepted an internship offer with KPMG in their home country to

expand their experience. Global interns are assigned to client engagement teams and work alongside talented KPMG professionals. During this program, you will benefit from mentoring and performance management and have access to our top-rated training.

Learn more about the program [HERE](#).

Global Opportunities Program

Our Global Opportunities (GO) Program is open to KPMG professionals in 147 different markets around the world. The program gives you a chance to explore different ways of doing business across various cultures. You'll build your network by working with new people in new places, and collaborate on innovative solutions that can make a global impact on our business. Some rotations last for a few months, whereas others may take place for multiple years!



Travel to new heights with KPMG through the Global Internship! Featured here is Julia Ortiz, former Winter 2020 Global Intern participant in Auckland, New Zealand.



Give a book. Share a message. Start a story.

KPMG's Family for Literacy (KFFL)

At KPMG, we are focused on serving children at every stage of their academic career through corporate citizenship programs. KFFL is the firm's signature employee program to eradicate childhood illiteracy by developing the next generation of young leaders through reading. Since its inception, KFFL has distributed more than 5 million new books to low-income children in more than 100 communities across the United States. When you join KPMG, there are lots of ways to show you care.



Who is Kiffle, the KFFL mascot?



Martina Pettenuzzo
Campus Recruiting Manager



Jennifer Braddock
Campus Recruiting Manager



Larry Schwartz

Audit Partner

Alma mater: Bellarmine University

Larry is an Audit Partner from the Louisville office who is currently on secondment in Shanghai, China with our KPMG China firm.

Larry began his career as an intern in the Louisville office and was there for 12 years, before taking a position in KPMG's National Office in New York City. After 4 years in NYC, Larry returned to Louisville for 2 more years before moving his family to Shanghai. In Shanghai, Larry serves as the Asia Pacific Regional Coordinating Partner for one of KPMG largest clients, helping to plan and coordinate the annual Integrated Audit for in-scope components in the region, as well as assisting in the coordination of over 150 statutory audits throughout Asia.

While serving as a Senior Manager in the National Office, Larry advised audit engagement teams on complex accounting and audit matters and helped develop firm-wide accounting and audit guidance for KPMG partners, professionals, and clients, as well as participated in the Firm's Root Cause Analysis for various inspection Hot Topics.



Jennifer Tsai

Audit Senior Associate

KPMG history:

— **KPMG (Taiwan): 4 years**

— **KPMG (U.S.): 3 years**

A little more about me: I was born and raised in Taiwan and started my career with KPMG in Taipei where I specialized in manufacturing. In 2016, I decided to go on to a rotation program where I met 44 people from 16 countries. This program led me to Louisville and taught me how to be independent and strong. While in Louisville, I have been exposed to a more diverse industry experience including the restaurant and healthcare industries.

Outside of work, my passions are to introduce people about my beloved country and volleyball

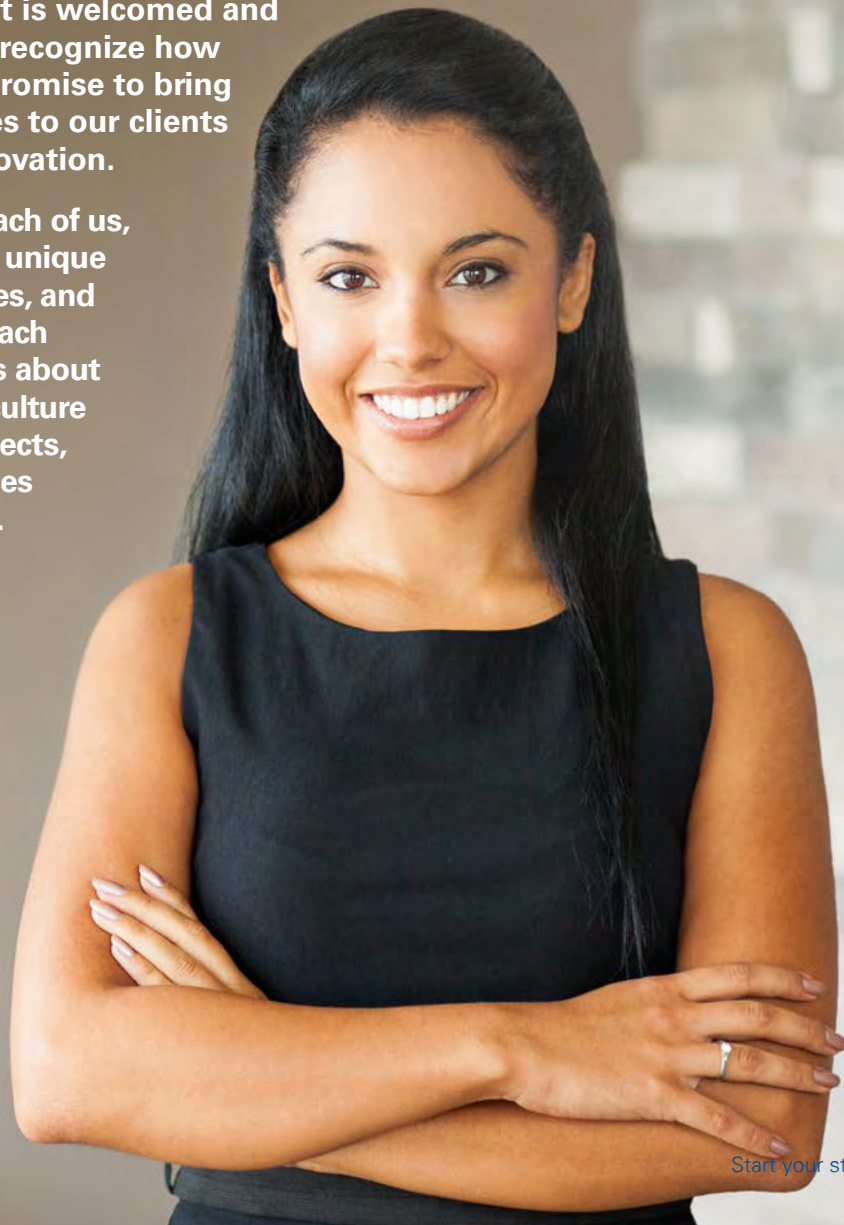


Chapter 5: Inclusion and Diversity

Expect inclusion and diversity

At KPMG, we lead with inclusion first. We believe that building a truly inclusive culture is essential to becoming the Clear Choice. With an inclusive culture, all of our people feel a sense of belonging at KPMG. All of our people are able to bring their whole self to work and be conscious of their unique importance and contributions to the firm. We aspire to be a firm where diversity of thought is welcomed and embraced, and we recognize how this supports our promise to bring the best approaches to our clients and encourage innovation.

Diversity is about each of us, about the variety of unique experiences, qualities, and characteristics we each possess. Inclusion is about all of us creating a culture that embraces, respects, and values differences for all of our people. At KPMG, we choose both.





Inclusion and diversity at KPMG

- KPMG is in the Top 10 of the DiversityInc Top Companies for Diversity 2019.
- KPMG consistently ranks as one of the Human Rights Campaign's "Best Companies" and "Best Places to Work" for lesbian, gay, bisexual, and transgender professionals. We've achieved a perfect score on their Corporate Equality Index for the past 15 years.
- The KPMG Women's Leadership Summit brings many of today's most accomplished women together to inspire the next generation of women leaders.
- Our more than 200 business resource groups and inclusion councils are open to everyone, provide meaningful opportunities to develop relationships, and strengthen the firm's culture.
- KPMG Veterans Network has grown to 24 chapters across the country since its founding in 2012. The network's mission is to actively support our people who have served in our nation's military and to help recruit veterans who want to build a career at KPMG.
- *Working Mother* magazine has placed KPMG on its prestigious list of the 50 Best Companies for Multicultural Women.

Business Resource Groups (BRGs) and Inclusion Councils

Abilities in Motion

Hispanic Latino

African Ancestry

KPMG Network of Women

Asian Pacific Islander

pride@KPMG (LGBT+)

Veterans

Guiding Principles

- ✓ Inspire **BOLD** Inclusion
- ✓ Drive **ROBUST** accountability

- ✓ Empower **DYNAMIC** networks
- ✓ Consistent employee **EXPERIENCE**

Inclusion & Diversity

Updated January 21, 2020

Objective: To provide an inclusive environment that attracts and retains a values- and purpose-driven diverse workforce; cultivates the intellectual capital of unique skills, backgrounds, and experiences for innovative solutions; and enables all of our people to thrive in their careers.



are women, people of color, veterans, LGBT+, or people with disabilities

Employee Engagement Survey results



Underrepresented populations
87% **GPTW** **88%** **GPTBC**

GPTW = great place to work

GPTBC = great place to build a career

222

Business Resource Groups (BRGs) & Inclusion Councils

- African American
- Abilities in Motion
- Asian Pacific Islander



13,000+

BRG members and growing

- Hispanic Latino
- KPMG Network of Women
- pride@kpmg (LGBT+)
- Veterans

49%



of partners and employees **participate in Inclusion & Diversity** events

+9% FY20 vs. FY19 membership growth



Professionals lead our local and national Business Resource Groups and Inclusion Councils

Workforce diversity



45%

Partners & employees are women



34%

Partners & employees are people of color

Procurement

18.6% of total spend with small and/or diverse businesses



KPMG training supports inclusive culture: **Respect and Dignity, Lens of Inclusion, Unconscious Bias, Straight for Equality & Disabilities Etiquette Awareness training**



I&D Speaker Bios



Eric Logan

Principal – Industrial Manufacturing Strategy;
Operations CoE Lead

Eric currently serves as a Principal in the Industrial Manufacturing Strategy practice and Lead of the Operations Center of Excellence at KPMG, LLP. In his role, he serves C-suite clients at Fortune 200 companies in cost management, supply chain optimization, procurement, and operating strategy. Additionally, he serves as the firm's US Lead for their global Industry 4.0 initiative. He is also the Partner sponsor and lead of KPMG's Cleveland Inclusion and Diversity Council, as well as the lead of the Diversity Council for the Columbus Hub, which includes the Cleveland, Columbus, Cincinnati, Indianapolis, and Louisville offices.

Prior to working at KPMG, Eric held the position of Vice President and General Manager of Special Metals Welding Products Company in Newton, North Carolina, a subsidiary of Precision Castparts Corporation (PCC). Previously at PCC, he held positions of Vice President of Commercial at the PCC Revert Group, General Manager of McWilliams Forge Company, Division Manager at Huntington Alloys, and Vice President of Business Strategy for PCC Forged Products. Prior to PCC, he was an Executive Advisor for international strategy firm, Booz and Company. He has also worked in various positions in metallurgy, quality, and operations in the steel industry for LTV Steel, International Steel Group, and NorthStar BHP Steel.

Throughout his career and life, Eric has also maintained a dedication to community and civic service. In Cleveland, he currently sits on the boards of Team NEO, Esperanza, Inc. and the Domestic Violence and Child Advocacy Center. Nationally, he serves on the National Advisory Council of "A Better Chance, Inc.," a program that helps place underprivileged minority students into top notch secondary schools. Eric has previously been recognized by A Better Chance, as a "Rising Star" and Crain's Cleveland Business as a member of the 2011 "40 under 40" class.

Eric holds a Bachelor of Science degree in materials science and engineering from Stanford University in Stanford, California and a Masters of business administration degree from Case Western Reserve University in Cleveland, Ohio.

Community, Inclusion, and Diversity:

Tuesday, June 2 | 2:30 p.m.–3:30 p.m

Thursday, June 4 | 10:00 a.m.–11:00 a.m



Jennifer Tsai

Audit Senior Associate

KPMG history:

– **KPMG (Taiwan): 4 years**

– **KPMG (US): 3 years**

A little more about me: I was born and raised in Taiwan and started my career with KPMG in Taipei where I specialized in manufacturing. In 2016, I decided to go on to a rotation program where I met 44 people from 16 countries. This program led me to Louisville and taught me how to be independent and strong. While in Louisville, I have been exposed to a more diverse industry experience including the restaurant and healthcare industries.

Outside of work, my passions are to introduce people about my beloved country and volleyball

Community, Inclusion, and Diversity:

Tuesday, June 2 | 2:30 p.m.–3:30 p.m

Thursday, June 4 | 10:00 a.m.–11:00 a.m



Chapter 6: Innovation

Innovation in action

When innovation is at our core, we work in a creative and forward-thinking manner every day. The entire firm embraces an open and questioning mindset that continuously seeks to offer meaningful ideas and insights. We view marketplace disruptors not as roadblocks, but rather as opportunities to help clients. Together, we accelerate KPMG growth and success. Read on to see how we are embracing innovation as a firm. To learn more about innovation, view our microsite [HERE](#).

Master of Accountancy with Data and Analytics

To keep pace with the modern world, accounting students need to receive an education that emphasizes data and analytics, which is why KPMG has worked with some of the country's leading business schools to create a first-of-its-kind KPMG Master of Accounting with Data and Analytics Program. As part of the program, students will earn either a master's degree in accounting with data and analytics or a master's degree in taxation with data and analytics from a participating university, providing them with the coursework and real-world experience they need to hit the ground running in today's data age. [Click here](#) for more information and to learn how to apply.

KPMG Clara

KPMG Clara is the KPMG next-generation audit platform which is designed to facilitate more seamless and transparent interactions between you and your engagement team. This secure online platform offers a centralized portal that serves as a single source for the exchange of important information, including valuable insight into the status of your audit.

Tax Ignition

KPMG Ignition Tax brings together our professionals' extensive knowledge of industries and business functions with the latest skills in signals-sensing, design thinking, data science, and solution development. We work with clients to help proactively plan for disruption, exploring fresh insights, new business models, and breakthrough solutions.





KPMG Lakehouse

The new KPMG learning center, KPMG Lakehouse, is an exciting opportunity to expand our ability to develop our extraordinary people and invest in their growth and development.

This state-of-the-art center sits on a 55-acre site in the community of Lake Nona in Orlando, Florida. A \$450 million investment in our people, Lakehouse is a cornerstone of a strategic learning transformation at KPMG designed to ensure we will attract and retain the best talent, equip our professionals to help clients meet the challenges of a dynamic marketplace, and support innovation throughout the firm. [Take a tour of Lakehouse with our interns.](#)

KPMG Lakehouse is an entrepreneurial place where **learning** exists in everything, **innovation** is everywhere, **culture** is shared and **people are inspired**.



800
single-occupancy
rooms



Meeting space
with flexibility
to accommodate
up to
1000
people



Multiple
dining options,
including a
dining hall,
coffee bar,
wine bar, and
social venue



Amenities with
a focus on
total wellness,
including a
fitness facility,
and jogging/bike
paths



90 learning
and innovation
spaces spanning
100,000
square feet



Design
elements
that celebrate
and reinforce
KPMG's rich
history, values,
and culture



■ Start your story session hosts



Blair Manning

Audit Senior Manager/Primary Recruiter

Alma mater: University of Kentucky

Blair is a Senior Manager in KPMG's Louisville Audit Practice and the primary recruiter for the Louisville office. Blair is a graduate of the University of Kentucky. She has almost 14 years of experience in providing external audits to a broad range of clients, including clients within the restaurant and healthcare industries. Throughout her career, Blair has provided integrated audits, financial statement audits and carve-out audits and reviews. In addition to her role as an Audit Senior Manager, Blair serves as a national instructor for audit trainings and is a Continuous Improvement Champion for the MidAmerica business unit.

Final Q & A with Primary Recruiter

Thursday, June 4 | 3:30 p.m.–4:15 p.m.



Chapter 7: Compensation and benefits



Compensation and benefits

At KPMG LLP, our people are our most valued asset. From the very start of your career, we want to help you build a strong foundation for your financial future.

This chart shows an example of the total compensation and firm provided benefits a newly hired Audit, Tax, and Advisory Associate may receive from KPMG.

Sample KPMG compensation and benefits

Typical components (which can vary with your performance):

Base salary \$60,000*

Potential annual awards

— Annual variable compensation award	\$1,600
— Encore award	\$300
— Early Career Rewards (ECR) program perks	\$1,200

Annual value of benefits paid by KPMG:

— Medical insurance subsidy**	\$4,296
— Health Savings Account (HSA) contribution	\$500
— HSA contribution—healthy rewards	\$200
— Short-term Disability/Life insurance	\$390
— Estimated Social Security/Medicare tax	\$4,735
— 401(k) Plan—firm match	\$1,500
— Estimated annual pension plan credit	\$1,350

Your total annual rewards **\$76,071**

In addition, to the above recurring items, your future compensation includes:

- One-time **\$5,000** CPA incentive bonus if you pass the CPA exam before your hire date or within your first year of exam eligibility (not to exceed three years from date of hire)
- One-time **\$7,000** pension credit in year 1
- One-time ECR award of **\$8,000**, paid 3 years after promotion to senior associate***

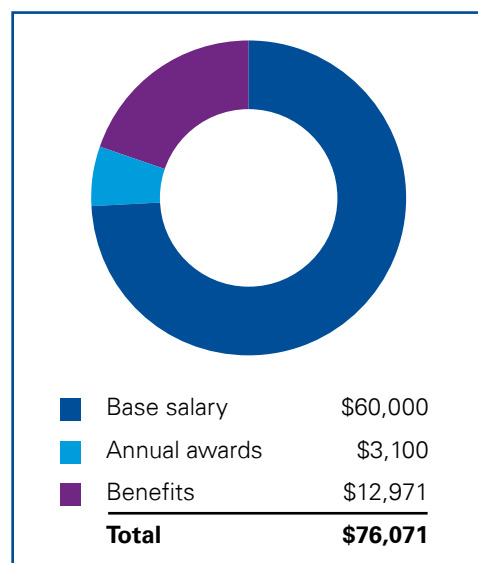
*The base salary is a rounded sample. Please reference your offer letter for your base salary.

**Assumes individual only coverage in KPMG's Med 1600 plan

***Paid in May following 3 year period. The ECR award is not included for Social Security purposes.

KPMG and you

- Competitive salary
- Various annual award programs
- 50% 401(k) match on eligible contributions
- Subsidized health care coverage
- Up to \$700 annual deposit to your HSA
- Pension Plan
 - Initial \$7,000 credit
 - Annual pension service and interest credits
- Wide array of voluntary benefits



*The above scenario is just an example of a compensation package. Circumstances may vary based on market, practice, economic conditions, etc.

KPMG and you – Your financial future

At KPMG, we know how important it is to start working toward your financial future, even if you’re just beginning your career. Through our pension plan and 401(k) plan, KPMG works with you to build your wealth. This is one of the many reasons why KPMG is a great place to work and a great place to build your career.

The chart below shows the accumulated pension and savings plan accounts for an employee, age 24, who begins working on January 1 with a \$60,000 base salary. If, in addition to the one-time pension plan credit and annual pension credits received, this employee contributes 5% to the KPMG 401(k) Plan, receives annual salary increases averaging 9% inclusive of promotions over a five year period, and gets a 5% annual investment return, his or her accounts would grow as shown below. If more than 5% of base pay is contributed, the grand total would be even greater.

Information at hire	
Entry level	Associate
Age	24
Compensation	\$60,000
Value after 5 years	
Firm-funded 401(k) match	\$9,500
Firm-funded Pension	\$16,300
Total firm-funded amount	\$25,800
Your own 401(k) contributions	\$19,500
Total wealth accumulation by year 5	\$45,300

The numbers above are estimates for illustration purposes only and have been rounded up to the nearest hundred. Actual contributions, the amount of any earnings on accounts or future salary increases may vary from year to year, thus producing different results.

The KPMG 401(k) Plan—working together to help you save for the future

- Just 60 days after you join the firm you are eligible to enroll in the plan and make contributions through payroll deductions.
- KPMG matches **50% of each eligible dollar** you contribute to the plan based on contributions up to 5% of your eligible base pay. This gives you a maximum matching contribution of **2.5% of your eligible base pay** for the calendar year assuming you contribute at least 5% of your base pay and you are employed on December 31.
- You are always 100% vested in your own contributions (as adjusted for investment returns). As for KPMG’s matching contributions and any investment return thereon,

you become fully vested in these amounts gradually over your first five years of employment with the firm, beginning with 20% vesting after two years of service.

- The KPMG Pension Plan—a foundation for the future**
- The KPMG Pension Plan is a cash balance plan funded entirely by KPMG.
 - Your participation in this plan is automatic and benefits are provided at no cost to you.
 - You become a plan participant after one year of service from your date of hire provided you are credited with at least 1,000 hours during the plan year and are at least age 21.
- Among the benefits you’ll receive with the KPMG Pension Plan are:**

- **A one-time \$7,000 pension credit* to your plan account.** At the time you become a plan participant, your plan account is credited with a one-time \$7,000 credit.
- **Annual service credit.** In addition to the one-time credit, each year you are a plan participant KPMG will credit your account with a percentage of your base pay (within IRS limits) provided you are credited with at least 1,000 hours during the plan year. The percentage increases from 2.25% to 11.5% with your age and service with KPMG.
- **Annual interest credit.** Your account also earns interest each year. The interest credit rate is based on the 30-year Treasury rate for the year (but never less than 5%).
- **Fully vested benefits after three years of service with the firm.** If you leave the firm before completing three years of service under the terms of the plan, you forfeit your plan account. But if you complete three years of service, all of your accumulated service credits and interest credits including the \$7,000 pension credit are 100% vested and cannot be forfeited.

- Achieving the right balance—long-term security plus current flexibility**
- While both our pension and 401(k) plans contribute to your long-term financial security, the 401(k) plan also provides current flexibility. You may access a portion of your 401(k) plan balance while employed through a loan or hardship withdrawal, and may take your vested 401(k) plan balance with you should you leave the firm.

KPMG Health Savings Account

If you participate in a high deductible medical plan, such as Med 1600 or Med 5000, each year KPMG will contribute up to \$700 to your Health Savings Account (HSA), which is yours to keep, to help you pay for medical expenses you may incur either now or in the future.

* The one-time \$7,000 pension credit is applicable only to certain individuals hired as Audit, Tax, and Advisory, associates, senior associates, or managers (job family 3, 4, or 6).

All Pension Plan credits and 401(k) contributions are subject to various IRS limitations.

One year of service is credited under the Pension Plan if you work at least 1,000 hours during the plan year May 1—April 30. If re-employed with KPMG, only nonvested participants who have forfeited their prior balance receive the \$7,000 pension bonus on re-entry to the plan.

The description of the KPMG plan provisions discussed in this summary is for general information purposes only. The plan documents and their provisions are very detailed.

If there is any conflict between the description in this summary and the legal plan document, the terms of the plan document take precedence. KPMG reserves the right to amend or terminate any benefit plan at any time in its sole discretion.

Any payroll-related tax estimates are for illustration purposes only and may vary based on individual circumstances. Contributions to a 401(k) plan made on a pretax basis are subject to Social Security and Medicare tax, but not to Federal and state income tax (in most states; there are a few exceptions).

KPMG LLP is an affirmative action, equal opportunity employer, M/F/D/V



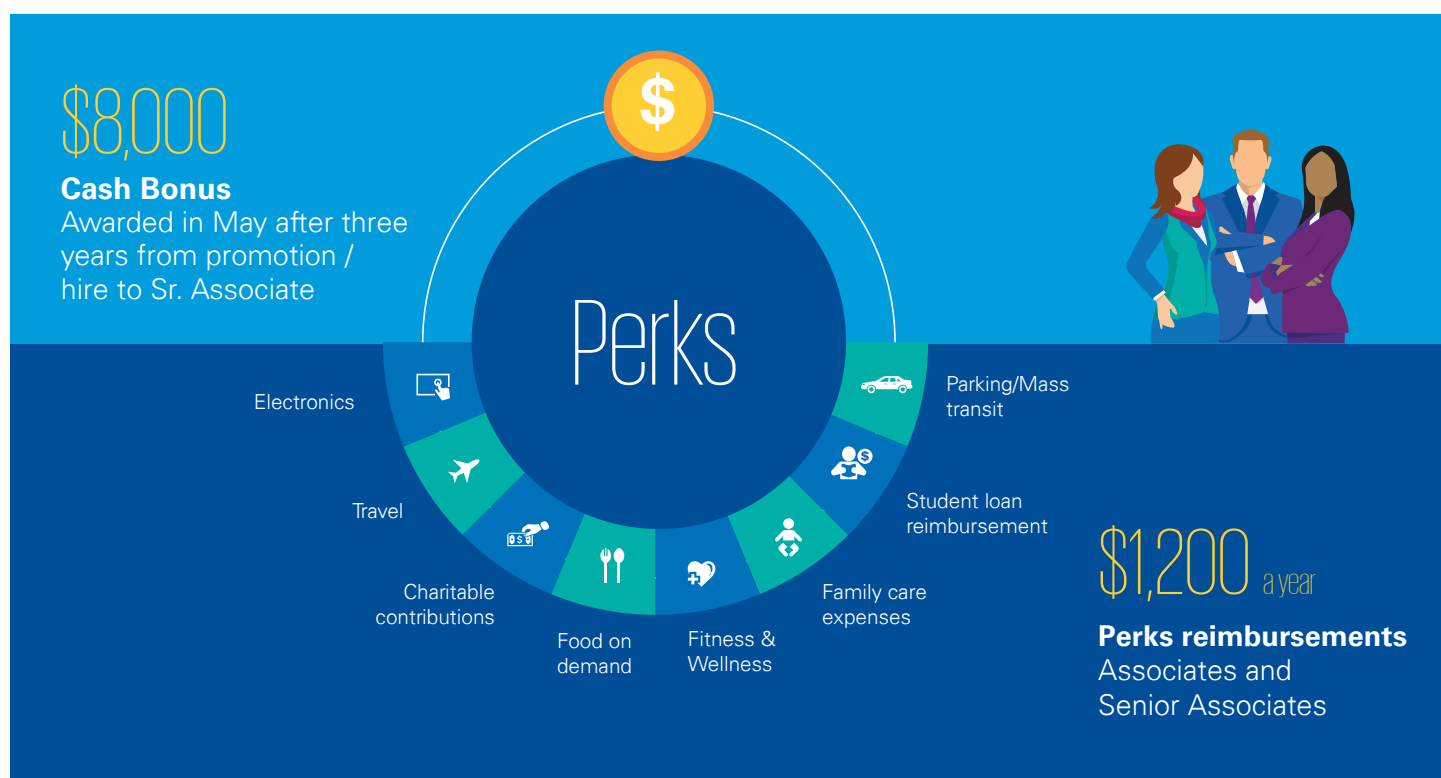
Early Career Rewards Program

Investing in your tomorrow, while making life easier today

Early-career professionals like you are critical to our firm's long-term success, and in turn we're committed to providing attractive rewards that recognize the contributions you make—both now and in the future.

We know that your overall happiness and well-being are just as important as your professional opportunities.

So, in addition to the attractive and competitive compensation we provide all of our people, we've created this special rewards program just for early-career KPMGers that not only provides a long-term financial incentive but also makes life easier today by helping pay for some of the things that are most important to you right now.



How does it work?

The program is comprised of two components:

- Annual **"perks" reimbursements of up to \$1,200 each fiscal year**, which can be used to pay for a variety of personal expenses—from student loan payments to electronics to food delivery to gym memberships!
- A **one-time, \$8,000 bonus** to recognize your investment in your career at KPMG. This bonus will be paid out in May following either three years of service from being hired as a senior associate, or if you are hired as an associate and then are promoted to senior associate, three years after your promotion.

Who is eligible?

- This program is open to client service associates and senior associates who are:
 - U.S. KPMG LLP Employees
 - Full-time (including those on reduced work schedules)

Ask your recruiter for more details on KPMG's Early Career Rewards!

Start your story with KPMG



Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates.

kpmg.com/socialmedia



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