

MONTANA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

# Creating a Legacy

Annual Report 2017

*Legacy*   
*Foundation*

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## A Growing Legacy

MSCPA's Legacy Foundation, our 501(c)3, was founded in 2010 to promote the future of the profession and bring opportunities to today's CPAs.

Bank Balance	
2011	\$ 20,019
2012	\$ 59,062
2013	\$ 97,007
2014	\$110,431
2015	\$134,169
2016	\$158,076
2017*	\$181,810

*\*as of October 31, 2017*

## MSCPA Endowment Fund Update:

This fund was created in 2000 as a way to support our scholarships and is a separate fund from the Legacy Foundation. It is managed by the Montana Community Foundation.

Balance per MCF Statement    October 31, 2017        \$159,345

Distributable earnings on        March 31, 2017        \$7,000

Seven \$1,000 scholarships were awarded in 2017. Two Eldon & JoAnn Kuhns Family scholarships and five general scholarships.

# Legacy Foundation

The MSCPAs Legacy Foundation had an outstanding 2017. With your help, the Foundation has grown from an idea in 2010 to a strong supporter of the accounting profession today.

We believe strongly that our future lies in developing the leadership talent of our young professionals. The Foundation does this through a variety of programs. Each year the Foundation provides scholarships to help Montana students earn degrees in accounting. We also help students and educators attend the Annual Conference and provide sponsorships to events bringing leadership speakers to Montana. In the past, the Foundation has supported members participating in the AICPA Leadership Academy, so if you know a young CPA with leadership potential strongly encourage them to apply for this program.

None of this is possible without your support. This year MSCPAs celebrated the career of Executive Director Jane Egan. In recognition of her contributions to CPAs in Montana you gave over \$26,000 to the Foundation. Past donors continued to give and this year were joined by 100 first time donors, we thank all of you for your commitment to the Foundation.

## Developing Leaders



One issue we face in Montana is “brain drain”, since many of our students leave the state after graduation. Some of these students are unaware of the great opportunities for CPAs in Montana. To show students what is possible the Foundation sponsors students to attend the MSCPAs Annual Conference. This year 20 students attended and learned about businesses committed to Montana. Their experiences will help them make a more informed decision about where to go after graduation. Here are some examples in their own words of the impact of the event:

- This was an inspiring two days filled with great keynotes, impressive panels and exemplary professionals.
- Accounting is not something that I would have associated with passion, but that is exactly what the conference taught me.
- The public accounting profession goes well beyond simply filing tax returns, and the conference did a great job of covering the many different facets, which I appreciated as a student.
- For myself, I found the “Success in Montana” panel to be one of the most interesting discussions at the convention. It gave an inside look at where businesses can use help from the accounting profession, and opportunities for accountants to pursue in the private sector.
- Also, being able to see how dedicated members are to community service in their communities and the state as a whole is very powerful and showed me how CPAs can affect the lives of their clients and others outside of their principal business.

We hope to continue bringing students and members together at the MSCPAs Annual Conference so we can show the next generation of CPAs what a great profession we have.

We want to hear from you about other possibilities for the Foundation’s future. What ways do you want to see the Legacy Foundation support accounting in Montana? Share your ideas with any member of the MSCPAs staff or the Legacy Foundation Council.

As we near the end of 2017, we ask you to remember the Legacy Foundation in your year-end giving. Please consider giving back to the accounting profession that has given us so much.

Thank you for your support.

### THE LEGACY FOUNDATION COUNCIL

Ron Yates, Chair–*Eide Bailly, Billings*

Dr. Teresa Beed–*Retired, Missoula*

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or send checks payable to:

**MSCPAs Legacy Foundation**

**PO Box 138, Helena MT 59624**



# Success Stories

*The Montana State University Billings Accounting Club held an event with Olympic gold medal winner Tyler Hamilton to talk about the importance of ethics. The event brought together students and local CPAs to learn and network. The Legacy Foundation was a sponsor of the event and will use this event as a pilot for future sponsorships. Working with the accounting clubs at Montana's colleges and universities, the Legacy Foundation will provide assistance to bring speakers to campuses and to connect students with CPAs in their communities.*

We know that with your help we can create more phenomenal success stories just like this one. In 2018, the Legacy Foundation will provide **20 student scholarships** to the 105th Annual Conference AND **5 educator scholarships**. Building these relationships is how we grow our success. If we can persuade Montana students to build a career in Montana, we will all benefit.



## Fundraising Fun

Each year at the Annual Conference we ask our members to support the Legacy Foundation through a fun fundraiser. Thank you to all who have given in the past and join us June 21-22, 2018 in Missoula to be part of the fun!



# Honor a Special CPA

The Legacy Tree offers a special way to celebrate those people who have influenced our profession and lives so greatly. Honor the career, life, or accomplishments of that exceptional person with a plaque on the Legacy Tree.

A \$2,500 cumulative donation will provide a tribute plaque that includes the name and photo of the honoree. The \$2,500 level can be donated by multiple people or an organization or a combination of the two.

The Legacy Tree is an wall sculpture in the MSCPA office in Helena. As our donations grow the tree is filled with beautiful leaves, fruit and birds in different colors. Each leaf, bird and apple is inscribed with the names of donors who have reach the levels shown on the next page of this publication. The tribute plaques will be placed between the branches, framed by the generosity of our members.



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