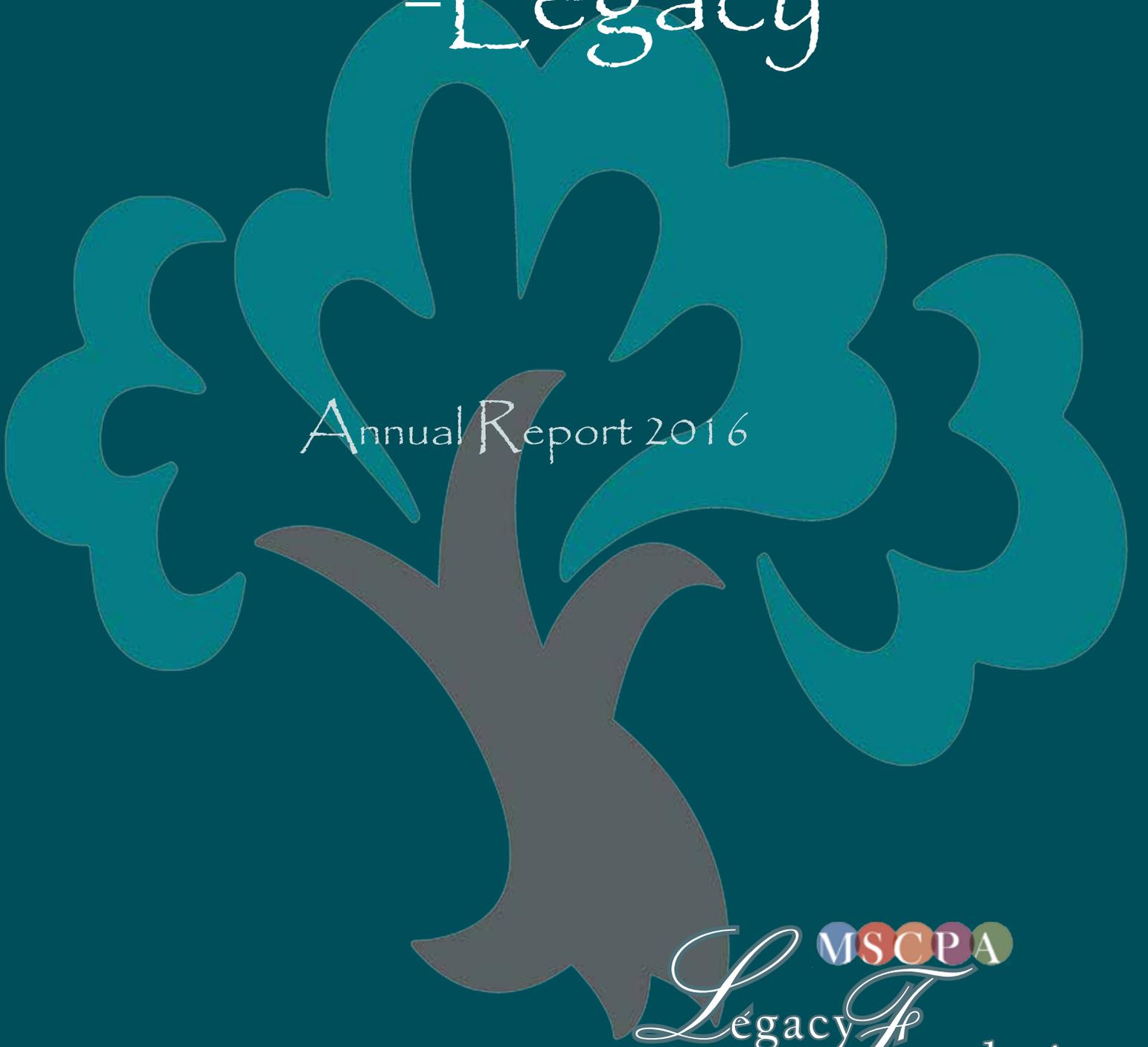


MONTANA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

Creating a Legacy

Annual Report 2016



 Legacy Foundation

Legacy Foundation

In 2016, the MSCPA Legacy Foundation started seeing our dreams take shape. We've been growing this Foundation since 2010 and already the tree is bearing fruit.

Thanks to the great support of our members, we've captured the interest and attention of students by offering scholarships to our Annual Conference. The goal was to get the next generation of CPAs to be involved. With just two years of this scholarship support, students already account for 25% of the attendance at the annual conference, and not only are they networking, they are realizing Montana is a great place to have a career.

We believe strongly that our future lies in developing the leadership talent of our young professionals and we were happy to support Bozeman member, Austin Schuerg, when he was invited to participate in the exclusive AICPA Leadership Academy (see his story below). He's a great representation of a young leader and he continues the impact Montana is having on the national level.

We want to hear from you about other possibilities for the Legacy's future. What ways do YOU want to see the Legacy Foundation support accounting in Montana? (do we want to add a survey to the Legacy page of the website for people to contribute ideas?)

As we near the end of 2016, we ask you to remember the Legacy Foundation in your year-end giving. Please consider giving back to the profession that has helped each of us build our careers.

Thank you for your support

THE LEGACY FOUNDATION COUNCIL

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Donate online at

mscpa.org/about/legacy_foundation

Developing Leaders by Austin Schuerg, Simms Fishing Products, Bozeman MSCPA Young Professional Board Member

I recently had the honor of representing Montana at the AICPA's Leadership Academy (LA), thanks to the MSCPA Legacy Foundation. This four-day intensive program was designed to engage young professionals in a self-examination of leadership, what that means and how that impacts their personal life and career path. The program itself consisted of 38 young CPAs from around the country with very diverse backgrounds.



Barry Melancon | Austin Schuerg | Tim Christen

Prior to the academy, the first step was identifying each of our own leadership strengths. LA utilized the book *Strengths Based Leadership* by Tom Rath which was accompanied by a Clifton's Strengthsfinder assessment. I always had an idea of where my leadership strengths lie, but this assessment really cemented that for me and pushed me to begin identifying how to leverage those in my daily professional and personal life.

One of the highlights for me from the week was interacting with Barry Melancon, President of the AICPA. We had the opportunity to have a two-hour Q&A session with Barry and learned about his career path as well as where he sees the profession heading. He is truly an inspiring leader and the insights he provided were amazing.

The three takeaways for me from this program are self-awareness of my own strengths, awareness of what drives other's motivation and that leadership is facilitation. I would highly recommend it to any young professional in the accounting industry who is looking to either take, or position themselves to take, that next step in their career. A special thank you to the Legacy Foundation and the MSCPA for their support of my attendance to the Leadership Academy. I feel it was game-changer for me and I hope to assist and give back to the profession here in Montana as much as I can.

Success Stories

In 2015 the Legacy Foundation provided 10 scholarships for MSCPA student members to attend the Annual Conference. This was so successful and so well received, we provided an additional 10 scholarships in 2016. Word got around and other institutions started supporting students attendance and 24 students came to the 103rd Annual Conference in Fairmont this year!

The Annual Conference is an opportunity for students to experience their future, to network and learn like a CPA. The experience was so positive that one student shared:

*“I was on the fence about whether to stay in Montana or pursue a career with a Big 4 firm after graduation. After attending the conference last summer **I knew Montana would be the place for me to start my career.** The conference showed me the great opportunities and the amazing professional community staying and working in Montana would offer me.”* —Perri Taylor, UM Student.

We know that with your help we can have more success stories just like this one. In 2017, the Legacy Foundation will provide **20 student scholarships** to the 104th 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 state all of us will benefit.

Donate online at mscpa.org/about/legacy_foundation



Lana Kadoshnikov

Fundraising Fun

Each year at the Annual Conference we ask our members to support the Legacy Foundation, and oh, the fun we have raising money! Thank you to everyone who played our “Cover Up” game and helped us to raise nearly \$10,000!



Jake Carter



Clem Lockman



George Campanella



Angela Dose



Austin DeShaw
&
Bill Schrock

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Leadership Level \$25,000+ *Our newest category of donors*

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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

January 31, 2011	\$ 20,019.40
January 31, 2012	\$ 59,062.13
January 31, 2013	\$ 97,007.66
January 31, 2014	\$110,431.63
January 31, 2015	\$134,169.07
January 31, 2016	\$144,976.76

Total deposits this fiscal year \$ 14,302.89

Expenditures this fiscal year

Donate online at
mscpa.org/about/legacy_foundation