



# Who We Are & Who We Want to Be

*For the benefit of all staff and to safeguard our most important asset – our culture – we’re sharing these statements to explain what Plante Moran is and what it aspires to be.*

*We believe it’s the responsibility of each staff member to understand, embody, perpetuate, and live the culture that makes Plante Moran the caring, inclusive firm it is. Our ongoing attention to these matters will continue to be among the most important responsibilities of each of us.*

## CORE PURPOSE

To be a caring, professional firm deeply committed to our clients’ success.

## VISION

Little of consequence is accomplished unless there’s first a dream. Our founders, Elorion Plante and Frank Moran, dreamt of creating a professional services firm where staff are lined up on one side of the building looking to practice and clients are lined up on the other side looking to be served.

Plante Moran’s vision is that we will provide 100% of our clients with unmatched service, while having 100% of our staff members realize professional and personal fulfillment while taking joy in making the dream come true.

## MISSION

Plante Moran will be a broad-based, certified public accounting, consulting, and wealth management firm deeply committed to our clients’ success. Although we’ll continue to operate the firm in conformance with sound business practices, we’ll remain a professional firm with our primary emphasis on service, not profit. We’ll leverage our collective abilities to proactively respond to the needs of clients and represent true value in relation to cost.

## PHILOSOPHY & VALUES

Plante Moran is guided by our philosophy that’s best expressed in condensed form by the Golden Rule: “Do unto others as you would have others do unto you.” This philosophy is based on the following core values:

- We care. We care about our clients, we care about our work, we care about our families and our communities, and we care about each other.
- We strive to be fair.
- We commit to quality, integrity, and professionalism, consistently placing clients’ interests ahead of firm interests.
- We maximize individual opportunities within the context of the team.
- We are dedicated to preserving and enhancing our spirit, which is the sum of our attitudes and feelings toward clients, each other, ourselves, the firm, its principles, its philosophy, and how we collectively and individually practice the Golden Rule.



# Statement of Principles

*These principles reinforce and expand upon the values/philosophies that guide us and help to define the culture of Plante Moran, including what's expected of all Plante Moraners.*

## 1. Principle of Service

We will serve the needs of our clients by providing professional services of the highest quality. We will continue to develop our capabilities and processes to anticipate and satisfy client needs, always placing their interests ahead of our own. At the same time, we will help each client to become as self-reliant as practical.

## 2. Principle of Ethics

We will be guided by the highest level of ethics consistent with the Golden Rule. Individual staff members will not be required to perform work that offends their personal principles.

## 3. Principle of Recruitment

We will recruit individuals who have the attitudes and capacities for service, learning, and growth.

## 4. Principle of Compensation

We will compensate staff members fairly based on their contributions and provide benefits and other awards to recognize the “whole person” in alignment with the success of the firm.

## 5. Principle of Individual Progress and Advancement

We will encourage each staff member to progress within the firm and invest in career development opportunities that, in their best judgment, will contribute most to their professional growth and advancement. As a firm, we will support staff members in their career progression by first considering current staff members when filling higher-level staff openings. Recruitment of staff from outside the firm will be undertaken only when it appears to be in the best interest of our clients and the firm as a whole.

## 6. Principle of Collaboration

We will work as a team to serve our clients, employing the best skills and capabilities available to satisfy client needs. We will do this by delegating work to the experience level at which it can be performed most effectively.

## 7. Principle of Leadership

We will encourage and develop our staff members to be leaders within the firm and our communities. We expect they will embrace our long-standing belief in stewardship and strive to leave the firm better than they found it.

## 8. Principle of Individual Freedom

We will create an atmosphere that maximizes individual freedom with as few rules as possible. While this freedom requires greater individual responsibility, we believe this kind of environment maximizes the opportunity for each of us to flourish professionally.

## 9. Principle of Communication

We will maintain a free flow of important information to create a feeling of camaraderie among our staff. When done effectively, we create a culture of transparency, with openness, candidness, and frankness which builds deep, trusting relationships.

## 10. Principle of Decision-Making

We will maintain a timely yet thorough decision-making process, with decisions made at the most appropriate level. We will strive to be effective by keeping a balance between participation and efficiency.



## Statement of Principles (continued)

### 11. Principle of Common Good

We will operate the firm for the common benefit of all staff members. We will embody our “one-firm firm” model to more effectively share ideas, resources, and talent across the firm, thereby strengthening connections and building trust.

### 12. Principle of Balance

We will provide an atmosphere where balance is sought and celebrated: balance between work and family, between work and play, between professional accomplishments and personal pursuits, between head and heart, and between individual and team successes. We recognize that balance varies for each staff member and is a lifelong, constantly changing challenge.

### 13. Principle of Change

We will foster a culture where innovation is embraced and adapting to change is the responsibility of the entire Plante Moran team. Staff are empowered to be change leaders and good stewards of the firm who will pursue and adopt better ways of serving clients and working with one another.

### 14. Principle of Diversity, Equity, and Inclusion

We will uphold the dignity of each staff member. When each person feels there is a place for them at the firm, we become a stronger organization. It is, therefore, the shared responsibility of all staff to acknowledge and embrace differences and contribute to creating a shared sense of belonging among all staff members.

*Although we will continue to expand and refine the principles embodied in the Plante Moran philosophy, our emphasis will be on communicating, exemplifying, and living our “We Care” culture day in and day out.*