

## Benefits provide added draw for Plante Moran employees

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BY VINCENT LUCARELLI / THE BLADE

Though it is very much a large international company, Plante Moran's Toledo office does not lose the tight-knit characteristics of a smaller accounting firm.

"We have a Golden Rule philosophy of treating staff well, treating clients well, and that leads to a wheel of progress," said Kristin Hunt, the office manager of the Toledo branch, which provides audits and tax services, as well as a variety of consulting and wealth management services. She said that this core philosophy is what keeps her company afloat.

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The firm, with locations in Illinois, Michigan, Ohio, and Colorado as well as Mexico, India, Japan, and China, employs around 50 people in Toledo and serves close to 30,000 clients yearly across the world. It is being honored in the small company category as a Top Workplace by The Blade for the 10th time.

"We have a 'we care' philosophy. One of our founders was a philosopher actually," Ms. Hunt said, referring to Frank Moran, a philosophy student, who met future partner Elorion Plante while tutoring his daughter in philosophy.

Ms. Hunt described this philosophy as a two-part approach, supporting staff members so they can get the proper development while also hoping that that translates into the services that staff are providing to clients.

"It makes me feel proud," Ms. Hunt said of the honor of being awarded as a Top Workplace again. "To work in a field where there is high demand on hours during tax season, and to have a place where you feel valued, you want to come to work every day and are excited about being there and you feel like they are part of the team — that is very rewarding."

The company has enhanced the benefits provided to employees over the last few years following the rigors of the coronavirus pandemic and how that changed the accounting industry. Ms. Hunt said that it is these efforts that have really worked to increase the sense of value among Plante Moran employees.

First and foremost, Ms. Hunt pointed out that while the client work her firm does requires a lot of in-person contact, her employees prefer having guidelines they are trusted with over hard-and-fast rules they are forced to follow.

In this way, because of the choice between working from home, working with clients, or working in the office, Plante Moran has instituted "workplace for your day."

"On any given day, our staff members decide where the best place to work would be, considering meeting client needs," Ms. Hunt said. "There is an expectation that you will be primarily in person, but we understand that everyone needs a sense of flexibility and as long as everyone's needs are being met, we try to stay away from a rules framework.

"We thought the one-size-fits-all approach is not one size fits all anymore," she said.

This flexibility was a big attraction for Andrew Wettle.

Mr. Wettle, a senior manager in Plante Moran's tax department, has been in and around the company's Toledo office for over a decade and feels a real sense of community.

"Really from day one I felt welcomed. It is really a tight-knit group," Mr. Wettle said, noting that he interviewed with a few other places and did not get the same feel. "The people here are my true friends. I know everyone's spouses and kids, and there is really a small-company feel."

He even went so far as to convince his wife to apply for a job in the office, which she has now enjoyed as much as he has over the last nine years, Mr. Wettle said that one way the company culture is kept up is through little games and competition.

Euchre, fantasy football, a dessert bakeoff, and a chili cook-off are all competitions that the Plante Moran employees

are known to hold, Mr. Wettle said, noting these are events he really looks forward to.

“We are a very competitive office with a lot of Type A personalities, so everyone is looking for an outlet to have some fun,” he said.

Historically, Plante Moran has offered an “athletic reimbursement fund” that incentivizes employees to stay active. Recently, that program has been remodeled into what is called the “balance fund,” and employees can now use the funds for anything that helps them find “balance.”

“It is a flexible benefit plan,” Ms. Hunt said. “It allows our staff to be reimbursed for a portion of services or expenses for a variety of different things. It helps with people having a choice. They can reduce stress and take whatever is going to benefit them most.”

This could include child care, gym fees, college tuition or loans, cleaning services, or travel expenses.

Mr. Wettle said that he took a nice vacation last year and was able to receive partial reimbursements for the flights through the balance fund.

“It was a nice way to recharge our batteries,” he said. “We do very demanding work that is deadline driven, so building your workplace flexibility and timing flexibility is wonderful. It is a really cool perk.”

More flexible off days are also another recent invention of the company that has gone over well with employees.

In addition to normal days that staff would get off, there is one floating holiday that one could use as a paid day off wherever they wish, be that for a mental health day, a birthday, a cultural day, or a religious holiday.

“Recharge days” add another dimension to the idea of flexibility. These are days, usually two to three per year, in which the entire firm is shuttered, for the purpose of giving employees extra rest. This year, the company used Jan. 3 as a recharge day, when the company gave employees an extra day off to rest up after the holidays.

“We really try to help people with balance because of the nature of our work,” Ms. Hunt said. “We do have those peak seasons like during tax season. We know that if there are times when you are working a lot, there should be other times of the year where you are not working as much. It balances out throughout the course of the year.”

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From left, the Toledo partners of Plante Moran are Ashley Schade, Kristin Hunt, Sarah Schoester, and Robb Rose. (THE BLADE/DAVE SCOTT) [Buy image](#)