

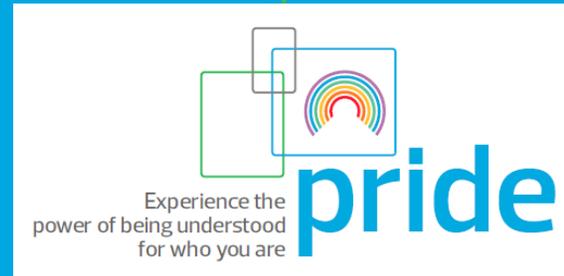
# LGBT ORGANIZATION SPONSORSHIP

Gay Polo League & RSM Story



# THE POWER OF BEING UNDERSTOOD

AUDIT | TAX | CONSULTING



# Your Facilitators



## Steve Kampa

RSM – Senior Tax Manager

612.455.9449 | [steve.kampa@rsmus.com](mailto:steve.kampa@rsmus.com)

Pride ENG National Leader



## Carolyn Pettke

RSM – ENG National Project Manager

312.634.5392 | [Carolyn.Pettke@rsmus.com](mailto:Carolyn.Pettke@rsmus.com)

Assists all 11 ENGs on Activities,  
Mission, Budget and ROI Factors



## Chip McKenney

GPL – President and Founder

323.712.3514 | [chip@gaypolo.com](mailto:chip@gaypolo.com)

CEO/CFO Phelps Media Group



## Phil Tremo

GPL – Marketing Lead

202.669.0094 | [phil@gaypolo.com](mailto:phil@gaypolo.com)

RSM Client of 18 years

## Today's Agenda

- 10 Min: Introductions
- 20 Min: Share RSM & Gay Polo League Story in Workplan
- 10 Min: Overview of the 4 Pillars of Strategies to Execution
  - Workplace, Workforce, Marketplace, Community
- 20 Min: You Complete Workplan
- 30 Min: You Share Best Practices, Challenges, Success Stories

# RSM US LLP INTRODUCTION



## RSM overview

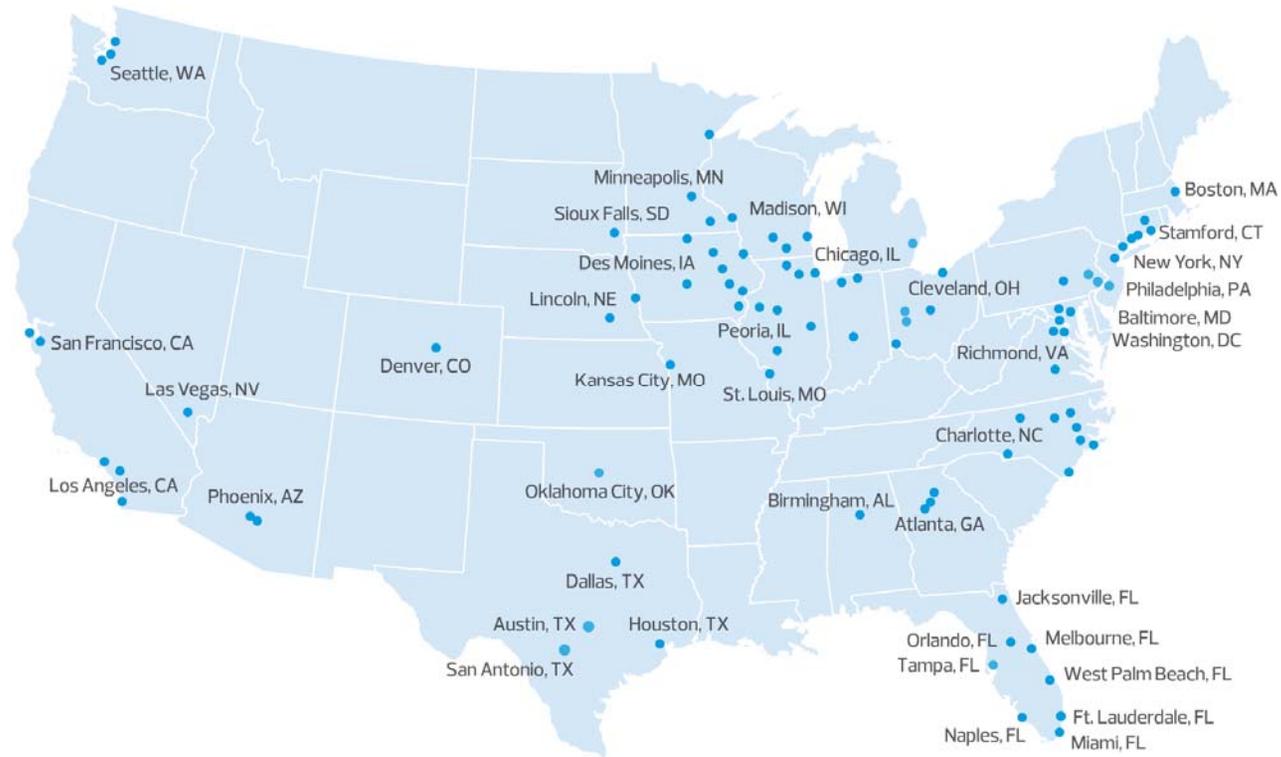
*First-choice advisor to middle market leaders, globally*

- **Largest firm world-wide focused on serving the middle market**
- **Fifth largest audit, tax and consulting firm in the U.S.**
  - Over \$1.8 billion in revenue
  - 90 cities and more than 9,000 employees in the United States
- **Sixth largest independent network of audit, tax and consulting firms globally\***
  - Presence in more than 120 countries
  - More than 41,000 people in over 800 offices
  - \$4.8 billion (U.S.) in worldwide revenues



\* RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit [rsmus.com/aboutus](http://rsmus.com/aboutus) for more information regarding RSM US LLP and RSM International.

# RSM US Locations



# RSM International Locations

## NORTH AMERICA

Canada  
United States  
Puerto Rico  
Mexico

## CARIBBEAN AND LATIN AMERICA

Argentina	Ecuador
Bermuda	El Salvador
Bolivia	Guatemala
Brazil	Honduras
Cayman Islands	Nicaragua
Chile	Panama
Colombia	Peru
Costa Rica	Turks & Caicos
Dominican Republic	Uruguay
	Venezuela

## EUROPE

Andorra	Belgium	Channel Islands	Czech Republic	Finland	Greece	Kosovo	Russia
Austria	Bosnia and Herzegovina	Croatia	Denmark	France	Hungary	Luxembourg	Serbia
Azerbaijan	Bulgaria	Cyprus	Estonia	Georgia	Ireland	Macedonia	Slovakia
Belarus				Germany	Isle of Man	Malta	Spain
				Gibraltar	Italy	Netherlands	Sweden
						Norway	Switzerland
						Poland	Turkey
						Portugal	Ukraine
						Romania	United Kingdom

## ASIA PACIFIC

Australia	Myanmar
Bangladesh	New Zealand
Cambodia	Pakistan
China	Philippines
Hong Kong	Singapore
India	South Korea
Indonesia	Sri Lanka
Japan	Taiwan
Malaysia	Thailand
	Vietnam

## AFRICA AND MIDDLE EAST

Afghanistan	Cameroon	Ivory Coast	Mauritania	Qatar	Tunisia
Algeria	Chad	Jordan	Mauritius	Saudi Arabia	Uganda
Angola	Congo	Kenya	Morocco	South Africa	United Arab Emirates
Bahrain	Egypt	Kuwait	Niger	Swaziland	Yemen
Benin	Ghana	Lebanon	Nigeria	Tajikistan	Zambia
Botswana	Iraq	Libya	Oman	Tanzania	Zimbabwe
Burkina Faso	Israel	Mali	Palestine		

\* RSM US LLP is the U.S. member firm of RSM International

As of Feb. 2017

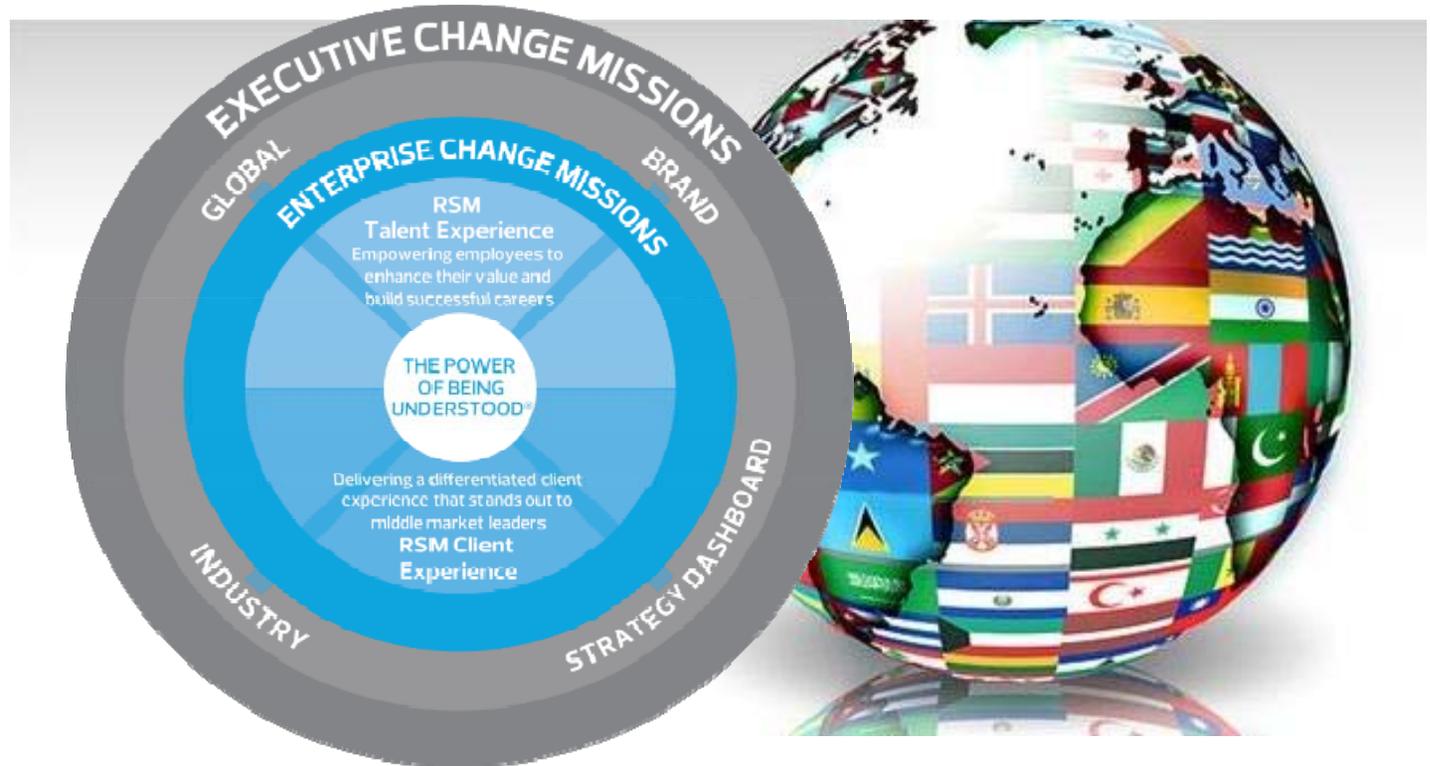
## CDI Mission



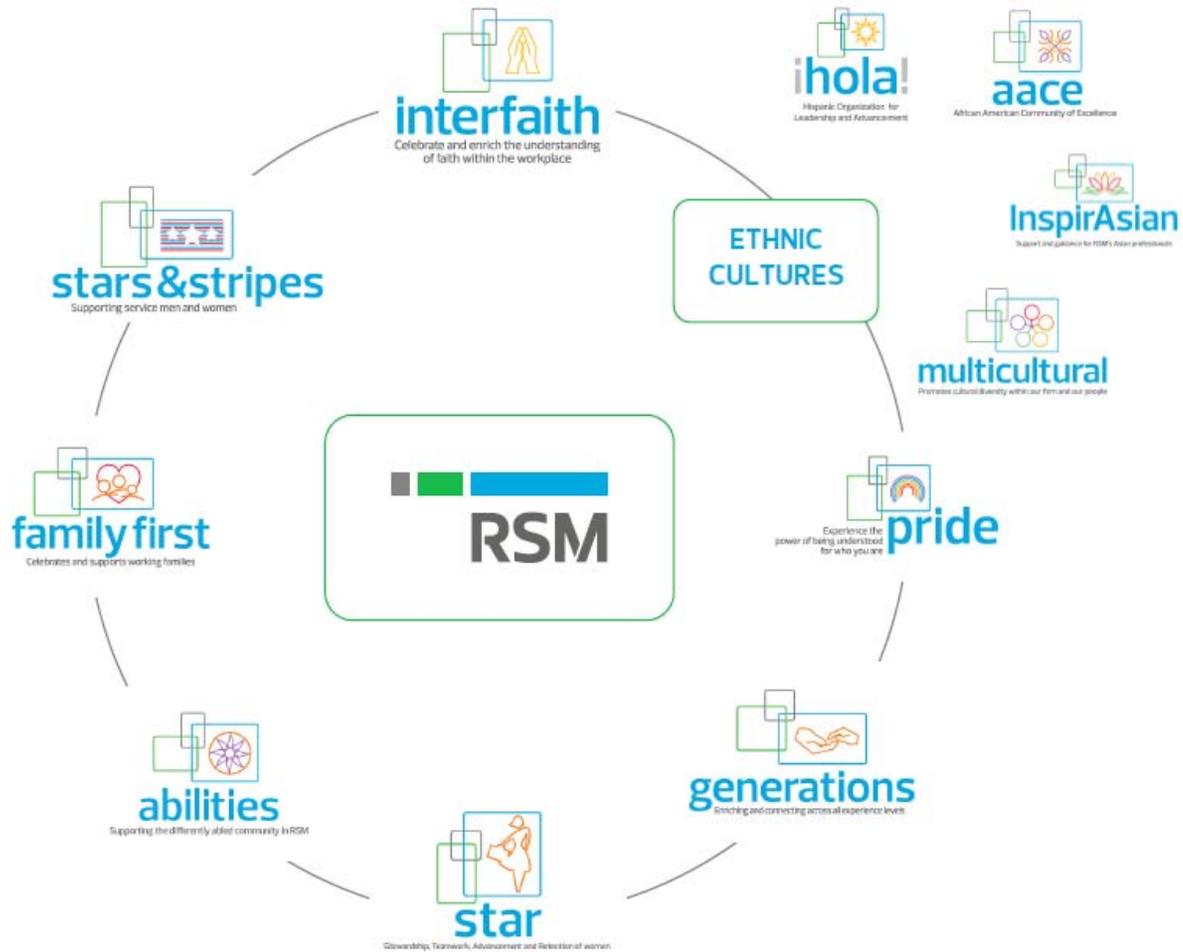
Transforming innovation, collaboration and business results through a culture of diversity and inclusion.

# CDI Return on Investment (ROI) Advantage

Leverage the benefits of a diverse and inclusive workforce/workplace to achieve corporate goals and objectives, and drive superior business results



# Introduction to RSM Employee Network Groups



# GAY POLO LEAGUE INTRODUCTION



# DISCOVER GAY POLO

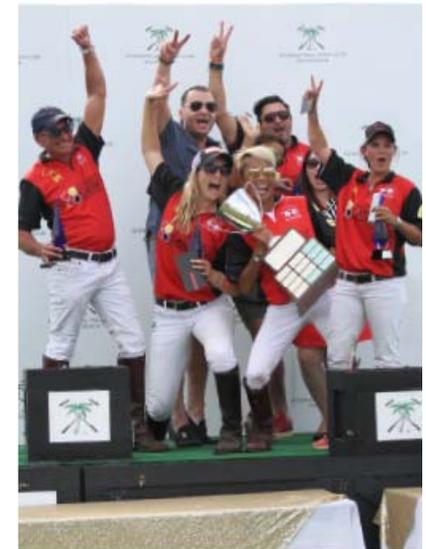
- Founded in 2006 by Chip McKenney
- North America's premier luxury LGBT sporting and social event
- Only LGBT Polo Tournament in the World
- USPA Sanctioned Tournament
- 5,000 Attendees
- Host of the World-Famous Tailgate Competition
- Four Polo Teams
- April 5-8, 2018 – Palm Beach, FL

13

©2017 RSM US LLP. All Rights Reserved.



STACIE SIMPKINS



FOUNDERS CUP WINNERS: SEMINOLE CASINO



WINNER OF THE 2017 TAILGATE COMPETITION: "GOD SAVE THE QUEENS"

# BUILDING A GLOBAL NETWORK OF LGBT POLO PLAYERS

Algeria

Argentina

Australia

Brazil

Canada

China

England

France

New Zealand

South Africa

United States



# POLO

## Community Snapshot

47 is the Average Age

70% Male 30% Female

68.3% are Married

90% have College Degrees

Travel Expenses per Annum: \$12,755

Average Household Income: above \$500,000

Average Net Worth is close to \$5 million

40% have Primary Residence Valued in excess of \$1 million

93.6% hold a Professional/Managerial position and 40.5% hold a Chairman/President position

Source: United States Polo Association

ANDRES LAPLACETTE (ARG)  
5-GOAL PLAYER

# THE ASSEMBLY



# LGBT

## Community Snapshot

Gay men are twice as likely to work in management positions and have a household income in excess of \$250,000

80% state they are more likely to support companies that sponsor LGBT events and fundraisers

66% are College Graduates

68% own their own homes

85% own a passport and 54% used their passport to travel in the last year

90% more likely to own an iPhone

91% use social media

Sources: 2014 CMI Gay Consumer Index

# READ ALL ABOUT IT!

Compete Magazine  
EquestrianLife.com  
The Equinery  
Hurlingham Polo Magazine  
Palm Beach Daily News  
Palm Beach Post  
Palm Beach Illustrated  
Passport Magazine  
POLO: Players Edition  
Polo International Magazine  
Polo SA Magazine

2017 WINNERS OF THE SENATOR CUP: CEDAR CREST STABLES  
ANDRES LAPLACETTE, SEVERENCE MACLAUGHLIN,  
MARK BENNETT AND STACIE SIMPKINS



Polo Times  
PoloZone.com  
reFresh Magazine  
Sidelines Magazine  
Sun Sentinel  
Washington Post  
Wellington Magazine  
Sun Sentinel  
Local and regional Television/Radio  
And many more!

# RSM Gay Polo League Sponsorship



## Welcome to the International Gay Polo Tournament



At RSM, we build strong relationships based on a deep understanding of what matters most to our clients. A simple request to sponsor a team from a League member and RSM wealth management client has grown into RSM's largest presence yet at the International Polo Club. We're proud to be a three-time team sponsor of the Gay Polo League.

## Messages for Gay Polo League Fans

**About RSM US LLP**  
RSM US LLP is the leading provider of audit, tax and consulting services focused on the middle market, with 9,000 people in 90 offices nationwide. It is a licensed CPA firm and the U.S. member of RSM International, a global network of independent audit, tax and consulting firms with more than 41,000 people in over 120 countries. RSM uses its deep understanding of the needs and aspirations of clients to help them succeed. For more information, visit [rsmus.com](http://rsmus.com), like us on Facebook, follow us on Twitter and/or connect with us on LinkedIn.

Keith Mayhew, Principal, RSM Wealth Management

Kerensa Butler, Partner, RSM Southeast PEG Leader and South Florida Pride ENG Leader

Steve Kampa, Senior Manager, National Pride ENG Leader



# 4 PILLARS OF STRATEGIES FOR EXECUTION & ALIGNMENT

18

# Vision

Leverage the benefits of a diverse and inclusive workforce/workplace to achieve corporate goals and objectives, and drive superior business results

## The RSM Difference



### Workplace

Foster an inclusive environment in the **workplace** that embraces our similarities and differences to drive innovation

Non-Discrimination Statement on Social Media

NC Equality Letter

Financial Support of ENGs

Leadership Engagement

### Workforce

Engage a highly skilled and talented **workforce** that is reflective of our diverse community

Mentoring Program

Identification of LGBT Leadership Roles

Unconscious Bias Training

LGBT Student Association Sponsorship

### Marketplace

Work with our business leaders in the **marketplace** to identify and establish targeted market opportunities (both local and global)

Gay Polo League Sponsorship

NGLCC Memberships

International Opportunities with RSM UK

### Community

Cultivate external relationships with diverse suppliers and **community** organizations that support and sustain our business

Volunteer Opportunities to LGBT Community

Discussions with LGBT Clients/Prospects

Relationships with LGBT Community Leaders

# Pillars = Strategies for Execution of Vision

## 4 Pillars of Strategies for Execution

Workplace	Workforce	Marketplace	Community
Inclusive Leadership & Accountability	Recruitment & Staffing	Organization Growth	Community Involvement & Sponsorship
Tangible Office Accessibility	Retention	Client Relationships	Supplier Relations
Diversity Communication	Professional Development	Business Networking	Volunteerism & Stewardship
Training & Education	Leadership Development	Small Business Partnership & Alliance	Marketing & Firm Brand
Performance Management / Code of Conduct	Advancement	Marketing & Advertising	Corporate Social Responsibility
	Job Design & Compensation	Customer Service	
	Employee Benefits & Services	Innovation	

## Large Group Exchange

- What are your company's ENG strategies to execution?
- How are your strategies to execution defined?
- Do you prioritize your strategies to execution?

# OUR STORY

RSM US LLP & GAY POLO LEAGUE



# Pillars = Strategies for Execution of Vision – RSM & GPL Alignment

4 Pillars of Strategies for Execution			
Workplace	Workforce	Marketplace	Community
Inclusive Leadership & Accountability	Recruitment & Staffing	Organization Growth	Community Involvement & Sponsorship
Tangible Office Accessibility	Retention	Client Relationships	Supplier Relations
Diversity Communication	Professional Development	Business Networking	Volunteerism & Stewardship
Training & Education	Leadership Development	Small Business Partnership & Alliance	Marketing & Firm Brand
Performance Management / Code of Conduct	Advancement	Marketing & Advertising	Corporate Social Responsibility
	Job Design & Compensation	Customer Service	
	Employee Benefits & Services	Innovation	



# Drop Off Business Card for a Chance to WIN



Will be shipped to your business card address

Apple TV



# YOUR TURN

Exercise on Workplan

# Workplan Workshop

Think about:

- Brand alignment
- Your company's objectives from sponsorship
- Outside organization's objectives from sponsorship

## Table Discussion Report Back

- What are the gaps you identified between your company and outside organization? Any thoughts on how to remedy?
  
- What are your success stories?

THANK YOU FOR  
YOUR TIME AND  
ATTENTION

# Drop Off Business Card for a Chance to WIN



Will be shipped to your business card address

Apple TV



## RSM US LLP

+1 800 274 3978

[www.rsmus.com](http://www.rsmus.com)

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit [rsmus.com/aboutus](http://rsmus.com/aboutus) for more information regarding RSM US LLP and RSM International.

RSM® and the RSM logo are registered trademarks of RSM International Association. *The power of being understood®* is a registered trademark of RSM US LLP.

© 2017 RSM US LLP. All Rights Reserved.