



Corporate Social Responsibility

2023 HIGHLIGHTS



Land Acknowledgement

We acknowledge that Crowe MacKay's offices reside on the traditional territories of the First Nations, Inuit, and Metis peoples. This includes the land of the Kwanlin Dün and Ta'an Kwäch'än in Whitehorse; Yellowknives Dene First Nation; the Coast Salish in Surrey, Vancouver and on the Sunshine Coast; the Syilx in Kelowna; Treaty 6 territory in Edmonton, a traditional gathering place for the Nehiyawak/Cree, Niitsitapi/Blackfoot, Nakota Sioux, Iroquois, Dene, Ojibway/Saulteaux/Anishinaabe and many others; and the peoples of Treaty 7 in Calgary, the traditional territories of the Blackfoot Confederacy (including the Siksika, Piikani and Kainai Nations), the Stoney-Nakoda (including the Chiniki, Bearspaw and Goodstoney First Nations) and the Tsuut'ina Nation. We honour their ever-enduring connection to these lands.

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Letter from Our CEO

- Welcome to Crowe MacKay's 2023 Corporate Social Responsibility Report, where we share the stories of our firm's people, growth, and impact. This capsule of achievements highlights our teams across northern and western Canada's dedication to each other, our clients, and our communities.

Local Impact. Global Reach. - a theme that truly embodies our unwavering commitment to making a difference within the immediate communities we serve and globally.

At Crowe MacKay, our core values **We Care. We Share. We Invest. We Grow.** are the guiding principles behind every decision and action we take. These values are not just words but the essence of who we are and what we stand for.

For over 50 years, we have been living our core values. Starting with one office in Vancouver and a second in Whitehorse, Crowe MacKay's local impact now spans eight cities across two provinces and two territories. With nearly 500 team members, we are a firm whose impact is felt worldwide.

In this report, you will find stories about why our people continue to choose to #GrowWithCrowe. We share how our firm is contributing to a more equitable and thriving society and the remarkable impacts our clients are making in their respective industries – exemplifying how smart decisions create lasting value.

At Crowe MacKay, we believe in the power of smart decision-making. Every decision we make is guided by a long-term perspective, focusing on creating sustainable, long-lasting value not just for our firm but for our community, our clients, and the world at large.

As we move forward, we remain committed to these principles, ensuring our local impact resonates globally. Together, we will continue to care, share, invest, and grow.

Thank you for being part of this journey.



Stefan Ferris, CPA, CA
Chief Executive Officer

Corporate Social Responsibility Pillars



ORGANIZATIONAL HEALTH

We take a holistic approach to our people's well-being, creating opportunities for optimal health both in and outside of work by living our core values, inspiring innovation, encouraging growth and promoting excellence.



COMMUNITY & GLOBAL ENRICHMENT

We are committed to empowering our staff to actively participate in improving communities on a local and global scale, with a philanthropic goal of building opportunities for members to enhance the communities they live and work in.



ENVIRONMENTAL STEWARDSHIP

We are building a mindful culture that understands environmental impacts and commits itself to conservation and sustainable practices.



ECONOMIC RESPONSIBILITY

We operate responsibly through ethical practice and by adhering to professional standards.





- ▶ **\$625,000**
INVESTED TOWARD
HEALTH AND WELLNESS
- ▶ **\$31,000+**
IN EMPLOYEE RECOGNITION



Organizational Health

Fostering Wellness, Recognition, and Community

Our People

We believe in investing in our most valuable asset - **our people**. Our focus on health and wellness, along with fostering a vibrant social community, not only enhances the well-being of our team but drives our success. We aim to create an environment where everyone feels recognized, valued, and supported.



66
PARTNERS
423
TEAM MEMBERS
8
CITIES

“ I am truly proud to represent a firm that prioritizes business success and the well-being of our employees. As Human Resources Manager, I've had the benefit of witnessing firsthand the positive impact our initiatives bring to the health and wellness of our team. It's more than just perks; it's about fostering an environment where our people feel genuinely supported and appreciated. I've seen the smiles, heard the stories, and watched our employees thrive. Our efforts aren't just policies; they're a catalyst for cultivating a workplace that promotes health and well-being for everyone.”

Alena Christie
Firm-wide Human Resources Manager



CREATING LOCAL CONNECTIONS, ENSURE GLOBAL SHARING

At Crowe MacKay, we are committed to fostering strong connections within our teams. Through weekly events and firm-wide social gatherings, we provide opportunities for our team to build a foundational network. This approach facilitates team members in connecting with each other, acquiring new skills, and establishing a network of experts that can support them in specialized areas.



The Pinnacle of Excellence

Our Growth

\$74.9+
MILLION
IN REVENUE

13%
INCREASE
IN STAFF

8
NEW
PARTNERS

55
LEADERSHIP
PROMOTIONS

WELCOMING NEW TEAM MEMBERS TO PROVIDE EXCEPTIONAL CLIENT SERVICE

Crowe MacKay proudly announced the addition of Amrit Buttar to the team in September and Deanna Stuart in November as part of an ongoing commitment to provide Crowe MacKay clients with exceptional service. We welcomed Amrit and his team of professionals to our Kelowna office and Deanna and her practice to our Surrey location.

Amrit brings 24 years of experience, delivering exceptional accounting and financial advisory services to Kelowna's vibrant business community. Deanna brings over a decade of experience and specializes in serving owner-managed businesses, notably in the construction sector and not-for-profit organizations.

“Joining forces with Crowe MacKay is the next big step in my career, and I'm excited for the opportunity for me, my team, and clients. The leadership and team at Crowe are what attracted me to the firm, but the client-centric focus is what aligns with my values.”

Amrit Buttar, CPA, CGA
Kelowna



RECOGNIZED FOR EXCELLENCE

Crowe MacKay's Kelowna office has been voted Best Accounting Firm in the Best of Kelowna awards for the third consecutive year. Crowe MacKay Partner Lynn Wong was also this year's Gold winner of Best Accountant in Kelowna for the second year, with Kelowna Partner Nicole Kirubi winning Silver.



► SUCCESS STORY

Charles joined Crowe MacKay's Kelowna office in the fall of 2016 after obtaining his CPA designation with a national firm and had been elected into the partnership starting January 1, 2024. He has taught at the office's Annual Income Tax Update seminar and is committed to providing care when teaching team members and clients.

SHOUT OUTS!

Empowering employees to recognize each other for going the extra mile.

Anastasiia Shcherbyna

Anastasiia has been given a lot of new tasks and has handled them like a pro! Her work ethic and energy around the office do not go unnoticed.
Well done, Anastasiia!

Putting the Pieces Together

Diversity, Equity & Inclusion

In the ever-evolving landscape of diversity, equity, and inclusion (DEI), our firm's commitment to fostering an inclusive workplace has driven transformative change, amplifying our culture of acceptance, respect, and equality. Crowe's DEI Council continues to serve as leaders within the firm, championing initiatives and creating safe spaces that empower our people to show up as their authentic selves.



This year, we put the pieces together.

Taking our accumulated years of learning and unlearning, we applied our knowledge, sought feedback, challenged assumptions and changed our behaviours - staying committed to our continuous growth and improvement on our DEI journey.

EDUCATION AS THE FOUNDATION

We have prioritized the continual growth of our employees through a series of educational opportunities. Our workforce has expanded their knowledge and understanding of DEI issues by learning from guest speakers, hosting workshops, and having thought-provoking discussions. This commitment to learning empowers our employees to become DEI champions, cultivating a more enlightened and empathetic workforce.

CELEBRATING CULTURAL DIVERSITY

Our social activities have provided a platform for employees to share and celebrate their unique backgrounds and cultures. From cultural festivals to heritage month celebrations, we've embraced the beauty of diversity within our firm. These events strengthen employee bonds and help create a sense of belonging that transcends differences.



COMMUNITY ENGAGEMENT AND ALLYSHIP

Beyond our workplace, we've deepened our impact by actively supporting community organizations and standing as allies for minorities and underrepresented groups. Our commitment to community engagement reflects our dedication to effecting change beyond our firm's walls. We've taken tangible steps to support causes, mobilize resources, and create a more equitable society.



RESULTS AND IMPACT

The cumulative efforts of our DEI initiatives have led to a more inclusive, equitable, and representative workplace. Employee surveys reveal increased satisfaction, engagement, and a heightened sense of belonging. We've also observed a more diverse talent pool attracted to our organization, enriching our perspectives and driving innovation.

► LOOKING FORWARD

While we celebrate our achievements, we recognize our journey is ongoing. Crowe's dedication to diversity, equity, and inclusion is not just a strategy but a core value. "Putting the Pieces Together" is not just a theme; it's a commitment to continuous improvement. Our DEI journey encapsulates our pursuit of building a more inclusive future where every unique piece contributes to the beautiful mosaic of our firm. Together, we are creating a more inclusive world, one piece at a time.



Team Member Spotlight

Camille De Guzman

BEYOND BUSINESS: FINDING PERSONAL AND PROFESSIONAL FULFILLMENT AT CROWE MACKAY

The focus at Crowe goes beyond professional development, emphasizing a balance between career advancement and supporting employees' personal lives. We are committed to building a community based on our core values: **We Care. We Share. We Invest. We Grow.**, fostering belonging amongst our team.

Camille De Guzman remembers the nerves of joining Crowe back in 2021; not only was she new, but she decided to expand her skillset early in her career, joining the audit team without any prior audit experience. "I was surprised and grateful Crowe took me in," says Camille. "I remember being scared, but the people I worked with made it much better. My colleagues were approachable, easy to talk to, and always made me feel a team was behind me." This initial feeling of belonging and being valued set the stage for Camille's success at Crowe.

MENTORSHIP: THE CATALYST FOR GROWTH

From day one, Camille realized that there were no limits to the opportunities for her to grow her career at Crowe. The firm offers numerous opportunities for professional development, including training sessions and networking events, but for Camille, the most impactful tool was Crowe's mentorship program. "I felt like I had a team of cheerleaders," recalls Camille, reflecting on her successful completion of the Common Final Examination (CFE). "Everyone in the firm was willing to share their experiences and give advice, which was incredibly impactful."

Crowe's successful mentorship program results from the firm's collaborative culture, where doors stay open and organic conversations happen. Committed to technical training, we also understand the value mentorship has

in unlocking the potential of our people and catalyzing their growth beyond the confines of a spreadsheet. Soft skills, critical thinking, and emotional intelligence are honed due to conversations and newly formed relationships. "I developed many important skills outside of technical knowledge by working with such a diverse team," says Camille. "I was able to grow my interpersonal skills and emotional intelligence, significantly contributing to my professional development."

Knowing a supportive team was behind her gave Camille the confidence to try new things and take risks — especially when faced with a challenge.

HARMONIZING WORK AND LIFE: THE FLEXIBILITY PARADIGM

Finding harmony between our professional dedication and pursuing our passions can be challenging. This chapter in life included some significant milestones for Camille, requiring her to dedicate time to her career and personal ambitions. "Crowe always stood by me, recognizing my important life events." This included making time for wedding plans or going to prenatal visits without having to give up on work responsibilities or personal goals. "I never felt pressured to choose between my career and personal life — even during the busy season," she says. "The firm made sure I could manage both successfully."

A testament to Crowe's commitment to their employees' holistic well-being lies in the relationships forged amongst their teams. "My colleagues turned into friends," says Camille. "We spend so much of our time with the people we work with, so it's important that I get along with them. If I'm happy at the office, it will reflect not only in my work but in my personal life too." To Camille, these relationships are invaluable; she never questions the care the team has for her.

As a new mom, Camille finds reassurance in the relationships formed at Crowe, knowing that they support her and empathize with her. Camille remembers telling the partners she wanted to take an 18-month parental leave and how excited they were for her, "I never felt like I was jumping through hoops, but rather stepping through open doors."

"The partners are parents themselves, and they understand that my life with a baby is different now than it was before," says Camille, "whatever works for my family works for the team as well."

► A LASTING IMPACT

As her journey continues at Crowe, Camille can't help but reflect on the significant impact the firm has had on both her personal and professional growth. "The supportive environment here has made all the difference," she says. "From mentorship to work-life balance, Crowe has taught me invaluable lessons that extend beyond the workplace. My time here will always hold a special place in my heart." This makes evident the firm's commitment to creating an exceptional work culture where employees are not just numbers but integral members of a thriving community.

Crowe takes pride in providing an environment that fosters such growth. Camille's story is a testament to our commitment to our employees' holistic development, resonating deeply with our #GrowWithCrowe philosophy. Her journey illustrates how professional milestones can harmoniously align with personal achievements, creating a fulfilling and balanced life.

We congratulate Camille on her outstanding achievements and look forward to continuing to support her in her future endeavours. Her story is not just hers but a reflection of what we stand for at Crowe - nurturing, supporting, and celebrating every step of our team members' journeys.

Empowering Growth, Cultivating Excellence

Training and Development

\$66,400+
INVESTED IN
ONLINE LEARNING

46+
TRAINING
TOPICS

17+
HOURS IN-PERSON
CONFERENCE TRAINING

- DEDICATED IN-PERSON CONFERENCES
- REGULAR ONLINE TRAINING
- QUALITY MENTORSHIP OPPORTUNITIES

Committed to fostering personal and professional growth, we provide a comprehensive range of training opportunities for our entire team. By cultivating a learning-oriented environment, we emphasize the advancement and enrichment of our staff, empowering them to elevate their skills and follow their aspirations. From students to partners, everyone has the opportunity to **#GrowWithCrowe**.



► ANNUAL PROFESSIONAL CONFERENCE

Our Annual Conference in Whistler kicked off with an enriching cultural reception at the Indigenous Cultural Center, setting a welcoming tone to the conference. The conference featured international speakers exploring intricate topics such as grey zones and ethics. Additionally, industry experts and prominent leaders within Crowe presented insightful sessions. The event allowed working groups from different offices to engage and connect face-to-face, fostering firm-wide collaboration.



Niels Jensen, CPA, CA

Thanks so much for helping me with my sale of farm questions (during busy season, no less). Your knowledge and experience were impressive, and my client was super appreciative- she can now relax that she's finally sold the farm.

SHOUT OUT from
Robert Flux, CPA, CA, CPA (Illinois), CFP



Success Stories Start Here

Student Training and Mentorship

100+
HOURS OF
TECHNICAL TRAINING

20+
HOURS OF
MENTORSHIP

16
DEDICATED
MENTORS

\$25,000+
INVESTED IN
SCHOLARSHIPS
& BURSARIES



YOUNG PROFESSIONALS TRAINING SERIES

The Young Professionals Training Series comprises of 10 informative sessions delivered by seasoned internal professionals, offering valuable insights and expertise to individuals aspiring to advance into senior and management roles.

Covering essential topics such as **coaching**, **emotional intelligence**, **teamwork**, **goal setting**, **feedback**, and **conflict resolution**, sessions run from October to December, equipping participants with the necessary skills and knowledge to excel in their careers.

YUKON FIRST NATIONS GRADUATION SOCIETY

The Yukon First Nations Graduation Society award is given based on academic achievement by a First Nation graduate in Math 12 interested in pursuing post-secondary studies in math, accounting, and/or business. Each year, our Whitehorse office awards \$300 to a successful student.

“At Crowe MacKay, there's never a shortage of people I look up to for their outstanding leadership, character, and personality qualities, inspiring me to achieve the next level of my career and handle more responsibilities.”

Michael Yu
Vancouver



SCHOLARSHIPS & BURSARIES

As trusted advisors, we embrace our role in supporting the next generation in attaining their letters. We invite you to explore the scholarships and bursaries available across our eight offices, designed to facilitate the educational pursuits of aspiring professionals.

[Learn more about our scholarships and bursaries](#)

New Director of Training and Development

Nadia Craye, CPA, CA, CPA (IL)

Nadia became Crowe MacKay's Director of Training and Development in August 2023. She was drawn to the role because of her passion for both the accounting profession and education.

Over her years as a CPA, she has witnessed firsthand the transformative power of robust training and professional development opportunities in shaping successful careers. When the opportunity to lead Crowe's training and development initiatives arose, it felt like a natural progression of her career and Nadia saw it as a chance to make a meaningful impact. "It's a role that aligns perfectly with my values and aspirations, and I'm excited to continue driving positive change in the professional development landscape," Nadia shares.

Nadia's primary responsibilities are optimizing training programs, both in professional and soft skills, and overseeing and directing Crowe MacKay's CFE program, with a keen focus on implementing an efficient Learning Management System (LMS). Her short-term goal is to streamline Crowe MacKay's training processes, foster a culture of continuous learning, and provide team members with the resources they need. In the long-term, Nadia's hopes to position her department as an industry leader in training excellence, ensuring professionals, from CFE candidates to partners, have the tools and knowledge to excel in their roles and contribute to the firm's ongoing success.



"In the ever-evolving world of CPA professionals, the role of comprehensive training, covering both professional and soft skills, stands as an indispensable pillar of success. It's a bit like preparing for a grand adventure – you wouldn't climb a mountain without the right gear, and similarly, our CFE program equips candidates with the tools they need for their professional journey. Just as I've been on my fair share of travel adventures, I know the value of preparation, and our firm is committed to ensuring that candidates and CPAs are well-prepared for their career ascent. From the first step in the CFE program to reaching partner status and beyond, we're here to support every part of your journey."

Nadia Craye, CPA, CA, CPA (IL)
Firm-wide Director of Training and Development

► DEDICATED TO FOSTERING EXCELLENCE

Nadia Craye joined Crowe MacKay's Sunshine Coast office in 2010. She oversaw the office's assurance function while being heavily involved in training, professional development, and various quality projects. Nadia dedicated almost 15 years to mentoring, lecturing, marking, and coaching aspiring CPAs. This journey has taken her beyond the CPA National program, extending to collaboration with two universities in Montreal.

Nurturing a Healthy, Supportive Environment

Health & Wellness

\$638,000+

SUPPORTING OUR TEAM'S
MENTAL & PHYSICAL WELLNESS

\$4,400+

INVESTED IN HEALTH-RELATED
PRIZES & ACTIVITIES

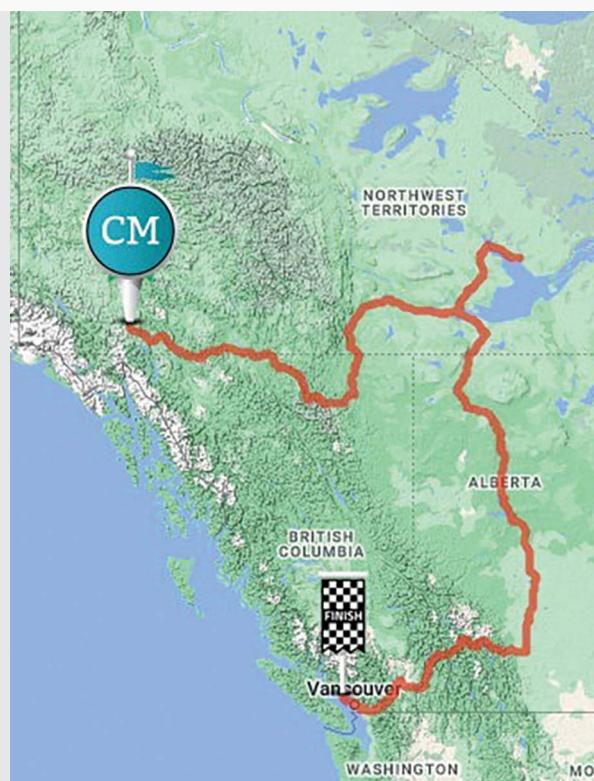
6,128 Kilometers

MOVED DURING
FITNESS CHALLENGES

At Crowe MacKay, we are strong believers that we aren't our best unless we feel our best. Our dedicated health and wellness initiatives reflect our commitment to nurturing happier, healthier lives for our employees and their families. Through a comprehensive approach encompassing mental health support, physical fitness activities, and robust health benefits, we strive to create an environment where wellness is integral. Our programs are designed to support and encourage our team members at every level, ensuring they have the resources and support needed to thrive both in and out of the office.

► LE TOUR DE CROWE: FUELING MOVEMENT AND TEAM SPIRIT DURING TAX SEASON

Le Tour de Crowe kicked tax season off with energy and camaraderie. In this unique fitness challenge, team members across our offices were randomly placed in teams before embarking on a virtual journey that took them from our Yellowknife office to the Sunshine Coast. By tracking their fitness activities, each team advanced from one office to the next, encouraging movement and motivation during our busiest time of the year. The goal of this activity was not just to travel from one office to the next but to celebrate teamwork, wellness, and the collective spirit of Crowe MacKay.



KELOWNA CELEBRATES TWO DECADES OF THEIR ANNUAL PING PONG TOURNAMENT

The Kelowna office celebrates two decades of hosting their Annual Ping Pong Tournament during tax season. This event, which has become a highly anticipated tradition among staff, not only helps team members take breaks from their work but also fosters a sense of camaraderie, upholding the firm's commitment to our core values: **We Care. We Share. We Invest. We Grow.**

“ The tournament upholds our core values as we care about staff and understand how demanding the work can be in March and April. It provides an opportunity to break up the long day and play a great game.”

Devin Hilbrecht, CPA
Kelowna



► CHALLENGING TEAM MEMBERS TO SWAP COFFEE FOR WATER WITH CROWE H2O

Crowe H2O challenges team members to swap their daily cup(s!) of coffee for water. To encourage participation, our firm gave out prizes and made a donation to Water First, Canada's leading charitable organization working with Indigenous communities to resolve local water challenges.



Creating an Engaged Workforce

2023 Employee Engagement Survey

At Crowe, we believe in the power of listening. Our latest employee engagement survey results showcase our overall employee satisfaction. These metrics are more than numbers; they are a testament to our thriving workplace culture and commitment to each employee's experience.

HIGHLIGHTS FROM OUR ENGAGEMENT SURVEY

We are proud to foster a workplace that drives optimism about the future and strengthens the bond between our employees and the communities we serve. Our survey reveals exceptional employee satisfaction, highlighting our success in creating a supportive and nurturing environment. This positive outlook reflects our commitment to empowering our employees in their decision-making processes, ensuring they feel valued and recognized for their contributions.

Our dedication to cultivating a culture of growth, advancement, and continuous improvement is evident through the enthusiastic feedback from our team. Employees see clear paths for career advancement, receive constructive feedback, and feel a strong sense of pride and belonging within the firm. Our investments in diverse, inclusive, and equitable practices that encourage open and honest communication reinforce these sentiments. Through these efforts, we enhance our team members' professional growth and positively impact the communities we are a part of, embodying our firm's core values and dedication to excellence.



Luke Heal

I appreciate you going the extra mile and having a positive attitude to assist our admin team during your busy day. Thank you!

SHOUT OUT
from Jean Guinea



Crowe is more than just a workplace. It's a community where innovation thrives and individuals grow professionally and personally.

These insights guide our path forward, reaffirming our commitment to nurturing a workplace where every member feels supported, recognized, and proud to be part of our journey. As we continue to build on these strengths, we remain focused on sustaining an environment that reflects our values and strategic initiatives.

► CELEBRATING OUR AREAS OF STRENGTH

Our firm is proud of the positive feedback from team members, celebrating our areas of strength in the categories below.



Optimism for the Future



Feedback and Growth



A Strong Commitment to Community



Pride and Belonging



Recognition and Advancement



Culture of Openness



Client Spotlight

KF Aerospace

Founded in 1970 by Barry Lapointe, KF Aerospace has become Canada's largest aviation Maintenance, Repair, and Overhaul (MRO) provider. Starting in Kelowna, now 53 years into their business with additional operations in Vancouver, Hamilton, Calgary, Ottawa, and Portage La Prairie, KF Aerospace has perfected its trade, becoming an unbeatable force in the aviation market.

OPPORTUNITY FOR INNOVATION

Recognizing a common "one size fits all" approach in the aviation maintenance industry, KF Aerospace identified market gaps and aimed to evolve into a comprehensive service provider. Rather than focusing on a single specialization, the company boldly decided to provide extensive in-house services, enabling them to cater to virtually any aerospace work request with tailored solutions for clients. With over five decades of expertise spanning aerospace engineering, manufacturing, testing, avionics, painting, and more, KF Aerospace has emerged as a highly respected and trusted player in the aviation sector.

EVOLUTION THROUGH THE AGES

Since 1970, KF Aerospace's success stems from a commitment to innovation and education. Their focus on staying current with evolving technologies and educating their team on aviation innovations has fueled their growth throughout the years. These strategies have enabled them to excel in the aviation market, alongside their maintenance and modification contracts, military pilot training, and support work for the Royal Canadian Air Force.

A clear demonstration of their commitment to innovation is their contribution to establishing a new Aerospace Engineering program at the University of British Columbia (UBC) Okanagan. Matt Stone, Engagement, Communication & Marketing Lead at KF Aerospace, shares that investing in education and training is "essential for business growth, fostering new capabilities, and innovative ideas." This, combined with substantial investments in their facilities and the implementation of a continuous improvement program, keeps KF Aerospace at the forefront of their industry.

“We continue to evaluate and expand our capabilities in this industry, looking for avenues to bring new expertise into our company."

Matt Stone

KF Aerospace Engagement, Communication & Marketing Lead

ACHIEVING YEARS OF SUCCESS

Matt credits the company's success to the team's daily demonstration of flexibility, agility, and consistently delivering high-quality results. Their knack for promptly addressing challenging and intricate problems with cost-effective solutions has fostered a strong rapport between KF Aerospace and its clientele. Matt underscores how their unwavering "commitment to quality and punctual deliveries has retained existing customers and attracted new ones, driving growth in strategic areas."

A LEGENDARY LEGACY

A passion for innovation and pride in their people creates an apparent legacy for KF Aerospace. With a myriad of possibilities ahead of them in a constantly evolving market, their mission will no doubt remain constant: to echo the goals of founder Barry Lapointe in creating "a legacy of aerospace excellence in Canada, by Canadians."

Nick Moffatt, Crowe MacKay Kelowna Partner, has worked closely with KF Aerospace since they became a client of the firm in 2000. Nick shares that KF Aerospace is Kelowna's largest private-sector employer. He applauds their investment in the local region, sharing that "the construction of the KF Centre of Excellence," a visitor's centre hosting a unique mix of airplanes, exhibits, history, science, and sightseeing that showcases the achievement and innovation in the aerospace industry in the Okanagan Valley, "and a significant contribution to the local YMCA to help build a new child care facility at the Kelowna airport are just a few of the most recent local investments." Nick notes that these initiatives demonstrate KF Aerospace's commitment to growth, innovation, and community well-being, staples to an organization's long-term success.

A commitment to providing quality employment opportunities and investing in the education of young people will continue to be the driving force behind the success of KF Aerospace and set them apart for many years to come.

Nick Moffatt, Crowe MacKay Kelowna Partner, and Miles Laing, Crowe MacKay Kelowna Associate, provide KF Aerospace with audit and tax support services.





Community & Global Enrichment

Rooted in Community

We are committed to giving back, both locally and globally. Through volunteering initiatives and generous donations, we have touched countless lives, contributing to a more equitable and thriving society.

THE CROWE PROMISE

Across northern and western Canada, our offices are committed to finding opportunities to strengthen their communities. Living our core values: **We Care. We Share. We Invest. We Grow.**, means putting people first. Through our culture of care, we strive to inspire our teams to make a difference. We invest in creating opportunities for our people, clients, and communities by fulfilling our Corporate Social Responsibility Pillars.

“As CSR Chair, I've seen firsthand how our teams are passionate about giving back to the communities they live and serve. Backed by the support of the firm and each local office, you can see that they provide lasting value to their communities to the same degree as their clients. I am proud to support our firm and each local office in ensuring the utmost success of each initiative, helping us to create stronger, more vibrant communities.”

Alexis McNeil
Firm-wide Marketing Manager
Corporate Social Responsibility Chair



- ▶ **\$170,000+** DONATED
- ▶ **180+** ORGANIZATIONS SUPPORTED
- ▶ **950+** HOURS VOLUNTEERED
- ▶ **110+** WINTER CLOTHING ITEMS DONATED



▶ YELLOWKNIFE'S SUPPORT FOR YWCA NORTHWEST TERRITORIES (NWT)

YWCA NWT released a “Welcome Home” fundraising campaign in response to the community's need for more affordable family housing. The campaign aimed to raise \$250,000 to furnish family apartments and shared program spaces. As long-standing friends of YWCA NWT, Crowe MacKay's Yellowknife office proudly donated **\$15,000** to the campaign in the hopes of helping the organization reach their goal.

“Family housing initiatives contribute to the creation and maintenance of vibrant and healthy communities, serving as a catalyst for positive change.”

Jennifer Arnold
Yellowknife



Giving Back to Our Communities



FESTIVE FAMILY SUPPORT WITH EVENSTART

Our **Calgary** office partnered with **EvenStart** and their yearly **Christmas Hamper drive**. Calgary team members were assigned four families, gathering various items they wanted or needed for the holidays, such as toiletries, cleaning products, toys, and clothes.



PROVIDING WARMTH AND CARE

Our **West Coast Offices** supported the **Lookout Housing and Health Society** for the second consecutive year. Serving thousands of people daily, the office donated to their annual **Winter Clothing Drive** and provided **100 care packages**.



CHAMPIONING EDUCATION & WARMTH FOR YOUTH

The Edmonton office supported the **United Way Alberta Capital Region** several times throughout 2023, collecting donations for their **Tools for School** program and **Coats for Kids & Families** campaign.

Thanks to Edmonton's involvement in the Tools for School program, United Way "can give kids the tools they need to succeed by reducing one of the known barriers preventing children and youth from successful learning and participation in school," Rob Yager, President & CEO of the United Way Alberta Capital Region, shares.



NOURISHING THE COMMUNITY

The **Food Bank Society** of the Yukon is a community-based organization that provides emergency food hampers to as many as 1,900 people a month. In the summer, our Whitehorse team spent the morning volunteering, assembling **food hampers** for those in need.



FUNDING NEW FAMILY HOUSING

YWCA Northwest Territories (NWT) sought support to expand its operations in helping women and families move from crisis to stability in a supportive, caring environment by building and furnishing a **new 21-bedroom family housing building**. Yellowknife proudly donated **\$15,000** towards the initiative.



HARVESTING KINDNESS

Helen's Acres relies on volunteers to help plant, weed, and harvest a variety of fresh produce that gets donated directly to social agencies in the community. The **Kelowna** office **volunteered for 67 hours** over two days this summer. They harvested raspberries and carrots in July, picked 4,300+ pounds of potatoes in August, weeded, and made a **\$1,500 donation** to support the farm.



Local Impact. Global Reach.

Diverse Support Branching Across Our Offices

BUILDING TOGETHER

Committed to donating a total of **\$7,500** over the next three years to the Sunshine Coast Community Services Society's (SCCSS) Building Together project, our Sunshine Coast office is helping to develop affordable housing for women in need in their community.

“Crowe MacKay LLP is deeply invested in our people, clients, and communities. Contributing to the SCCSS's Building Together project resonates with our core values, and we're thrilled to make a meaningful impact.”

Richard Wilson, CPA, CA
Sunshine Coast



25 YEARS SUPPORTING RUN FOR MOM

Every Mother's Day, the Whitehorse community gathers for Run for Mom. All funds raised from the event stay in the Yukon, supporting breast health for Yukoners. As proud supporters since 1999, our Whitehorse office's 25-year partnership has provided **over \$25,000** in donations.

► TIES & TAILS GALA

Our West Coast Office has proudly supported the Ties & Tails Gala for four years. In total, the team has donated **\$11,000**, helping raise much-needed funds to train guide dogs who support blind and visually impaired individuals, children with autism, and Veterans and First Responders with Operational Stress Injuries like PTSD.

► ACCESS TO TREATMENT CLOSE TO HOME

The BC Cancer Foundation, established in 1935 as BC's foremost philanthropic cancer research and care funder, initiated funding for the Systemic Therapy Suite to enhance cancer treatments in the BC Interior. Recognizing the need for local cancer treatment options, the Kelowna office contributed **\$50,000** to this suite, underscoring their commitment to community investment and improving access to critical therapies.

“This therapy suite will help ensure patients have timely access to the latest life-saving treatments closer to home and establish Kelowna as a center for excellence in patient-focused care.

Dave Gautier, CPA, CA
Kelowna



BÂRE PÎÎCHIYABI - BUILDING RELATIONSHIPS TRADITIONAL POWWOW

Bearspaw, Chiniki, Goodstoney First Nation, and the City of Cochrane collaboratively hosted a traditional powwow. In support of the four communities working to strengthen their government-to-government relationships through learning, continued collaboration, and participation in the First Nation-municipal Community Economic Development Initiative (CEDI), our Edmonton office provided a **\$5,000** donation in support of the powwow.



Celebrating Volunteerism

► Crowe MacKay proudly celebrated Volunteer Week from September 18 to 22. We encouraged our team members to share how they've positively impacted the community in 2023 and inspired our offices to unite and volunteer as a team.

As we concluded another successful Volunteer Week, over **50 dedicated** team members celebrated their volunteer efforts or actively contributed to community initiatives, leaving a lasting impact. Our firm is immensely **#CroweProud**, recognizing that our collective efforts have contributed to **950+ hours** of serving our communities.

With offices spanning northern and western Canada, our teams have dedicated their time to supporting various local organizations and initiatives. Groups supported include Helen's Acres, Tree Canada, Ride For Dad, Make-A-Wish Foundation, Sturgeon Public School Board, Fort Edmonton Foundation, Cops for Cancer - Tour De Coast, Vancouver Orphan Kitten Rescue, and others. This is only a glimpse of the incredible impact our team has made in 2023.



Celebrating Cody Lee's Selflessness

MAKING A DIFFERENCE, ONE WISH AND RIDE AT A TIME

Cody Lee from our Edmonton office selflessly dedicates her time to two organizations: Make-A-Wish Foundation and Ride for Dad.

Make-A-Wish Foundation is an international organization that provides life-changing wishes to children with critical illnesses. As a Wish Granter, Cody helps grant children's biggest wishes.

At Ride for Dad, she volunteers as an Event Coordinator. This organization tirelessly works to fight against prostate cancer, saving men's lives. Cody's been involved with the charity since 2008, joining the executive committee in 2017 and proudly acts as the current secretary.

When asked why she chooses to donate her time, Cody shares that "volunteering for me is about empathy, compassion, and supporting others in their time of need. It's supporting your family, friends, co-workers, and community." She also expresses how she hopes her volunteerism inspires those around her, especially her children.

“I love being able to show my children that through small acts of kindness and selflessness, you can truly make a difference in someone's life.”

Cody Lee
Edmonton





Environmental Stewardship

Creating Change Through Education & Action

Our dedication to sustainability is unwavering. We understand the critical importance of preserving our planet for future generations and are steadfast in our efforts to reduce our environmental footprint.



241 kg
OF GREENHOUSE
EMISSIONS AVOIDED

128+ Liters
OF FUEL SAVED

132+ Hours
OF ECO-CONSCIOUS
VOLUNTEERISM

41 Days
OF WATER DONATED

1,582.86 km
TRAVELED

BRANCHING OUT FOR A BRIGHTER FUTURE

Our Edmonton team branched out of their comfort zone, planting trees in Edmonton's Cavanagh neighbourhood as part of Tree Canada's National Tree Day initiative. Alongside community members, our team aided in planting 1,000 trees.

When asked what volunteerism meant to the Edmonton team, local CSR lead Jennifer Sushetski emphasized that "participating in National Tree Day allowed our team to connect with nature and have the satisfaction of knowing our volunteerism will benefit our community for years to come." Due to Alberta's record year of wildfires, Jennifer also emphasized how "replacing the trees lost this year is more important than ever."



► ENSURING SUSTAINABLE ACCESS TO SAFE WATER

Providing communities facing barriers to safe water, sanitation, and hygiene is fundamental to sustainability and environmental stewardship. It addresses immediate health needs and supports long-term ecological balance by promoting responsible water use and waste management. Our firm has partnered with **Guusto**, leveraging their innovative platform where each gift card sent translates into a donation of a day's worth of water to communities in need through the **One Drop Foundation**. In 2023, through our collaboration with Guusto, we proudly contributed **41 days of water**, embodying our commitment to sustainability and support for vital resources.



COMMITTED TO CARING FOR OUR PLANET

We are always looking for ways to give back. During the implementation of a new software platform, our firm looked for opportunities to align the launch date with our philanthropic endeavours, leading to the adoption of a panda through Pandas International. This non-profit is exclusively devoted to saving the Giant Panda. Our symbolic donation supports the care of cub Ji Fu and the organization's efforts to save giant pandas.

Meet Ji Fu

Born: August 6, 2022

Home: Wolong Panda Reserve, Sichuan, China



Client Spotlight

Human in Motion Robotics

A VANCOUVER COMPANY BUILT ON PENNIES AND PASSION

Founded in 2016 by Dr. Siamak Arzanpour and Dr. Edward Park, Human in Motion Robotics (HMR) has made waves in current exoskeleton technology. They've designed a product which empowers individuals with motion disabilities to walk freely, naturally, and independently. Starting as a small, highly skilled group of students, end-users, therapists, and organizations, HMR has gone on to build the world's most advanced exoskeleton system. Their innovation changes people's lives to an unimaginable degree.

IDENTIFYING ISSUES IN THE INDUSTRY

While wearable robotics are nothing new and have been available for many years, founders Arzanpour and Park noticed a significant issue in existing exoskeletons that stripped the end user of proper motion and independence. Current exoskeletons on the market only support one motion (i.e. forward walking) and require assistance for balance. "Our revolutionary exoskeleton supports all the motions and complex maneuvers that able-bodied people can do and creates stable human-like gaits that are fully self-balanced," explains Dr. Arzanpour. "Users are independent of arm crutches and human attendants for balancing." XoMotion, the group's versatile wearable robotic masterpiece, has provided those who need it most with full mobility and revolutionized the standard of care in rehabilitation centers.

STAYING AHEAD OF THE CURVE IN AN EVER-CHANGING TECHNOLOGICAL WORLD

With technology expanding rapidly, HMR is determined to maintain their position as leaders in the market, continuing to offer the best support to their users. To ensure continued success, HMR is committed to investing in research and development (R&D), attracting global talent that can help the company grow in new areas and add value to their product. "The most important factor in our success is our team," says Dr. Arzanpour, "HMR

benefits from young, talented, and hardworking team members who strongly believe in the company's mission of improving the quality of life for people with disabilities around the world."

In addition to their team, strong partnerships are pivotal to HMR's success. As a leader in the market, support from investors and the Canadian Government enables the team to continue their R&D. Coupled with ties to the world's frontier research centers in robotics, HMR is on a path to success, building strong relationships that allow them to stay ahead of the curve and on top of expanding technology in their field.

A LIFE CHANGING LEGACY

While HMR has many things to be proud of, from their groundbreaking innovation in human robotics to their commitment to R&D, nothing seems more rewarding to the team than their product's impact on the end-user.

“As a company built on pennies and passion, we had many ups and downs. What kept us united and determined to complete our work is the great memories we have from those in wheelchairs and their families. We cried with families who saw their loved ones walking independently again after years of disability.”

Dr. Arzanpour

Developing innovative technology that changes people's lives is a result of the heart HMR has committed to its product. Their unwavering compassion and focus on R&D will ensure their continued success as HMR strives to be the epicentre of wearable robotic technologies.

Logan Hoffert, Crowe MacKay Partner in Vancouver, provided accounting and assurance support services to Human in Motion Robotics. He prepared a review engagement and assisted the company in addressing investor questions concerning due diligence and comparisons of accounting standards.





Economic Responsibility

Smart decisions. Lasting value.

Being trusted advisors to our clients and communities is the foundation of our business. Adhering to professional standards and ethics are the principles in our responsible business practice. We cultivate responsible mindsets within our leaders, creating teams that strive to maintain ethics, transparency, and uphold trust in the Crowe.

► \$13,000 EMPLOYEE SECURITY AWARENESS TRAINING

“ I chose to **#GoCrowe** because at the time it represented a wild adventure (i.e. moving to the North) and it was time for me to step out of my comfort zone. One of my favourite things about Crowe is the ability to connect and collaborate with people in different cities with various backgrounds and capabilities.”

David Chen, CPA, MPAcc
Yellowknife



NEW CROWE GLOBAL CEO

The Crowe Global network elected Kamel Abouchacra, former Executive Director of Europe, Middle East and Africa, as the network's Global Chief Executive Officer position effective November 1, 2023.

“I am incredibly humbled to have been chosen to be the CEO of this network. I am dedicated to embracing change, no matter how disruptive that may be. We are living through extraordinary times with significant disruption facing the profession and global business. Now more than ever, our reputation as trusted advisors who provide lasting value, is paramount.”

Kamel's vision for the network is centred around working as one. He believes by integrating this approach to the Crowe brand, people, service quality, and technology, the network can escalate their success. “Crowe prides itself on bringing smart decisions to clients,” he says. “Greater collaboration across our member firms, our people and our network will enable us to take that promise to the next level.”

Learn about our unwavering commitment to quality, trust, and ethical practices.

[Read Crowe Global's 2023 Transparency Report](#)



► STEFAN ELECTED TO CROWE GLOBAL'S BOARD OF DIRECTORS

Crowe MacKay's CEO, Stefan Ferris, was elected to Crowe Global's Board of Directors, serving a two-year term. This is Stefan's third term as a Global Director.

Crowe Global

- **200+** MEMBER FIRMS
- **750+** OFFICES

- **145+** COUNTRIES
- **\$4.9 billion** IN REVENUE*

- **100+** YEARS OF EXPERTISE

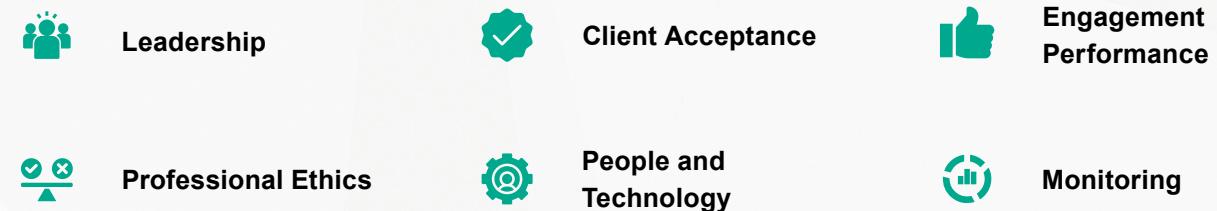
*2022 revenue

Quality Management

Pursuit of Continuous Improvement

The advancement of quality is a focus for our firm and our teams are committed to adhering to professional standards while leading their practices ethically and professionally. In 2022, the firm adopted a new system of quality management, transitioning to a pursuit of continuous improvement in quality through the evolution of quality processes and capabilities.

The core elements of the firm's quality management system include:



The firm's system of quality management has been designed to ensure people have what they need to perform quality engagements, including manuals containing policies and procedures developed against international auditing, quality management, and other professional standards; protocols that enable engagement teams to consult with subject matter experts across a range of topics; and cloud-based technology resources that provide access to tools at any location, day, or time.

A major component of continuous improvement is the performance of compliance monitoring. The firm performed walkthroughs of key controls and processes, and quality monitoring is being performed at the:

- Engagement level
- Office level
- Firm-wide level

To ensure continuous improvement, action plans will be designed and implemented to remediate any issues identified during the monitoring process.



In 2023, the firm adopted new engagement quality review standards and standards for the management of quality in an audit of historical financial statements. The new standards, working in tandem with the firm-wide system of quality management, operate at the engagement level to:

- Ensure the appropriate person is appointed to perform the quality review;
- Emphasize the importance of and improve the effectiveness of the quality review process;
- Implement a risk-based approach to quality; and
- Improve partner oversight.

The pursuit of continuous improvement is the theme for Quality in 2023 and will continue to be a strategic priority for the firm moving forward.

Local Impact. Global Reach.

Committees

Our teams embody our commitment to being trusted advisors to our clients and agents of positive change in our communities. By addressing specific local needs and aligning these efforts with our global vision, we not only serve our clients with integrity but also weave a network of impactful change. This strategic approach reinforces our focus on trust and excellence, nurturing local initiatives that resonate deep within the profession.



Executive Committee

- Daniel Sturgess
- Norman McIntyre
- David Gautier
- Lynn Wong
- Paul Harris
- Sam Kaketsis
- Stefan Ferris

Office Managing Partners

- Sam Kaketsis, Calgary
- David Gautier, Kelowna
- Paul Harris, Edmonton
- Stefan Ferris, West Coast Offices
- Mark Pike, Whitehorse
- Gillian Lee, Yellowknife

Innovation & Technology Committee

- Brian Grant
- Colin Kirkpatrick
- David Gautier
- Emily Chee
- Kristine Toynbee
- Logan Hoffert
- Michael Hubber
- Sam Kaketsis
- Srinivas Rao

Quality Standards Committee

- Aaron Halladeen
- Alexandra Lea
- Ashley Kidd
- Chris Galon
- Diana Huang
- Fred Deschenes
- Kiran Bhachu
- Logan Hoffert
- Nadia Craye
- Nick Moffatt
- Pejman Mahlooji
- Peter Woodruff
- Rachel Boulet
- Rochelle Mitchell
- Sara Zacharias
- Todd Freer

Corporate Social Responsibility Committee

- Alexis McNeil
- Alena Christie
- Gabby Escobar
- Gillian Lee
- Jennielyn Antonio
- Jennifer Sushetski
- Laura Hackett
- Lisa Kennedy
- Mabel Wu
- Mark Pike
- Michelle Fitzpatrick
- Moe Rynard
- Nicole Kirubi
- Peter Woodruff
- Thys Hoeve

Diversity, Equity & Inclusion Council

- Alena Christie
- Angela Faiz
- Bill Gill
- Brittany Pitruniak
- Emma Whipple
- Garima Singh
- Jonathan Luc
- Kathy Chin
- Peter Woodruff
- Shyrelle Martinez
- Virginia Lackey



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