

## work.

With offices in Washington, DC and Chicago, IL, Calibre CPA Group, PLLC was founded by several CPAs on a commitment “to provide services of a superior calibre.” And our mission says it all – we are a service-oriented firm dedicated to building trusted relationships with our clients and staff through responsiveness, integrity, face-to-face interaction, continuous follow up, and solid decision-making policies. By remaining faithful to our commitment, we firmly believe that we will have long-lasting relationships that stand the test of time.

Calibre CPA Group strives to stay ahead of the curve by monitoring and understanding environmental influences that may affect the personal and professional growth of our staff. We are dedicated to placing employees in roles where they can contribute, grow, and achieve. We seek out talented leaders, high performers and skilled innovators.

We feel we are a successful firm because we put our people first. We do this by:


- holding fast to well-defined core values for our employees;
- demonstrating to our employees how much we appreciate them;
- giving those that we interact with a voice in all matters;
- aiming towards a healthy balance of work and life commitments;
- providing an enriching learning environment; and
- creating an atmosphere where everyone feels they are part of our professional family.

## WHO WE WORK WITH

Calibre CPA Group’s clients represent many segments of the tax exempt, commercial, and governmental sectors of the nation’s business economy. The majority of our clients are not-for-profit entities – in fact, over 80% of our clientele come from the tax exempt community. We annually provide audit, tax planning and preparation, and consulting services for:

- not-for-profits, including:
  - charitable entities, educational, environmental, and professional societies;
  - social welfare organizations, religious, and special interest groups;
  - trade associations and membership organizations; and
  - labor unions – from labor and service-oriented organizations to business-related and professional organizations
- employee benefit funds (a variety of single and multiemployer benefit funds of all types); and
- for-profit entities (small businesses, sole proprietorships, construction, printing, trades, and manufacturing firms).

Our clients range from small, special interest groups with less than \$1 million in annual revenues to large international organizations with tens of billions in assets. We feel it is the diversity of our client base that allows our firm to grow with them while still providing local and personalized service.



“What I enjoy most about Calibre CPA Group are the people. Since joining the firm, I have built strong professional and personal relationship with both coworkers and clients. Calibre CPA Group’s strong workplace culture reflects the firm’s commitment to and respect for their employees. The firm has given me the opportunity to grow and develop my skills on a daily basis, whether in meeting with clients, managing engagements, or mentoring staff.”

— A. Stolker, CPA  
Audit Senior Manager

## play.

Several years ago, our partners discussed the importance of creating a nurturing and stimulating environment for all our employees. In their commitment to provide the best working environment for a firm our size, the partners agreed it was important to help our employees achieve an enjoyable work and home balance. After surveying our staff and discussing ways to encourage growth, professionally and personally, our “Calibre Cares” program was formed. The firm’s Social Committee serves as the driving force behind our Calibre Cares program and is in charge of the following functions:

### MONTHLY SOCIAL EVENTS

The Social Committee plans at least one activity per month for everyone to get together and just have fun. Past activities have included:

- attending a local Major League Baseball game
- hosting numerous social hours
- knocking down pins at a bowling night
- hedging our bets with a “March Madness” playoff
- testing Lady Luck with a casino night (in our office)
- dining and laughing at a premiere comedy club

These are a few of the activities the Social Committee puts together to help you “get to know” fellow employees in a more relaxed setting. Partners, managers, seniors, staff, and support employees regularly join these events and they are a great way for everyone to bond.

### REALLY BIG EVENTS

Our Social Committee also organizes three major events each year:

The “After Busy Season” Social Hour rewards everyone for completing Busy Season. Usually held on April 15 (promptly at 5:00 pm!), we have a social hour and then enjoy a sit-down dinner at a local restaurant. We have found it’s a wonderful time for us to reconnect as we share humorous stories about the past Busy Season.

Our Summer Picnic is usually held in July or August of every year. Typically, we will close our offices early on the day of the picnic and join together at a local park for grilled hot dogs and hamburgers, fresh crab, ice cream and more. A number of employees bring their families along and we all take part in volleyball, baseball and kickball games.

The firm’s annual Holiday Party is held on a Saturday evening just before the holiday season. Our Chicago personnel enjoy dinner at a sumptuous restaurant in the theater district of Chicago, while our Washington, DC employees enjoy dining and dancing at a local country club. Everyone is encouraged to bring a date and though dress is semi-formal, a few have been known to show up in their tux and tails!

“Because of the close personal attention we strive to give to our clients, Calibre CPA Group has encouraged me to strengthen my current relationships as well as foster new ones for the future. Calibre CPA Group has given me the tools and freedom to further my career with a balance between work and family. I also like that the partners have made a commitment to the future success of the firm and every employee is encouraged to take part in that future.”

— M. Vaccarella, CPA  
Audit Manager

## HELPING OTHERS

As part of our Calibre Cares program, we make it a priority to give back to the communities where we live and do business. While many of our employees are personally involved in community service, as a firm, we also elect to participate in such events as Toys for Tots, the National AIDS Walk, Walk for the Cure, Habitat for Humanity, and many more charitable activities. We challenge our employees to help their communities grow and to contribute to worthy causes, whether financially or through fundraising events.

**learn.**

## MENTORING PROGRAM

We believe that a fundamental aspect of developing our staff is providing a peer role model and confidant. Our mentoring program assigns every new employee to a mentor on their first day with the firm. The mentor is responsible for helping his/her new staff establish and work towards career goals, educating and integrating the new employee into our firm's culture, as well as serving as a sounding board for work and personal situations. We believe our mentoring program helps our new staff feel they are part of our team from day one.

## BECOMING A CPA

If you want to sit for the CPA exam and worry that you might not be able to work and study at the same time, Calibre CPA Group provides study time to prepare for the exam as well as the time it takes to complete the exam. We also have a reimbursement program for review courses, study materials, and exam fees.

## GROWING AS A CPA

Calibre CPA Group provides in-house and external Continuing Professional Education (CPE) opportunities for all our employees. These courses cover a wide variety of topics ranging from technical matters that affect our clients to managerial subjects that help our staff grow as professionals. Employees are eligible for tuition reimbursement at various levels, based on position, tenure, job performance, nature of the coursework, and grades achieved.

**live.**

## TO YOUR HEALTH

Making sure our employees are healthy, vibrant individuals is a top priority for our firm. To that end, we seek out cost-effective and innovative medical, dental, and other plans. Calibre CPA Group also provides comprehensive vacation, sick, and personal leave to enable our staff to reenergize. The following chart provides a brief overview of just a handful of the many competitive benefits we provide:



**“One of the best qualities of Calibre CPA Group is the firm’s personnel. My coworkers are genuinely interested in my daily life and not only will I learn a lot every day, but enjoy it! I think that’s what makes Calibre CPA Group so unique – it’s comforting to work in an atmosphere where you are viewed as an individual and your professional and personal growth are supported. I feel that when I was hired by the firm, they didn’t minimize my personality and my life, but rather embraced it.”**  
— L. Greene  
Staff Auditor



“Working at Calibre CPA Group has offered me a great work/life balance. I find the firm to have a supportive and enriching environment, with so many friendly people. Also, the firm’s Social Committee holds a lot of enjoyable events. Calibre CPA Group is one of the best firms I have ever worked for.”

— H. Johnson, CPA  
Tax Senior

<b>medical</b>	Calibre CPA Group pays two-thirds of the cost of medical insurance for employees and their families. The employee’s portion of the cost for coverage is paid via payroll deductions. A single person pays about \$50 each semi-monthly pay period.
<b>flex spending</b>	Our firm offers employees a flexible spending account (FSA) program. Participating in the FSA allows employees to set aside pre-tax salary dollars for eligible medical and dependent care expenses.
<b>dental</b>	Our firm’s dental policy is self-insured, meaning our partnership pays for your healthy smile. The longer employees are with Calibre, the greater their dental care reimbursements. Annual reimbursement maximums vary from \$400 in the first year you submit a claim to \$1,500 in the fifth and following years.
<b>life (and ad&amp;d)</b>	We provide life and accidental death and dismemberment insurance free of charge in the amount of your annual salary. Employees can choose to increase their coverage at minimal cost.
<b>disability</b>	We provide both short- and long-term disability insurance at no cost to our employees. Someone who incurs a short-term disability can expect to receive 30% to 60% of base salary for up to 180 days. Long-term disability coverage replaces 60% of salary if a disability lasts longer than 180 days.
<b>holidays</b>	Our firm generally observes seven holidays per year – New Year’s Day, Memorial Day, Independence Day, Labor Day, Thanksgiving (and the day after), and Christmas.
<b>vacation</b>	Our employees enjoy two to four weeks of vacation per year, based on their employment category and tenure. Up to 120 hours of unused vacation may be carried forward.
<b>sick</b>	While no one wants to be ill, Calibre CPA Group offers employees six sick days per year. This time is accumulated at the rate of one-half day per month. Up to 30 days of unused sick leave may be carried forward.
<b>personal</b>	We also offer up to two “personal” days per year, based upon hire date. Our employees use this time to attend to personal matters during our regular business hours. We also offer paid time off for bereavement, jury duty, military service, and for studying for and taking the CPA exam.
<b>retire</b>	The Calibre CPA Group 401(k) plan allows employees to set aside, on a pre-tax basis, a portion of their salary for retirement (subject to IRS limitations). The firm also helps our staff grow their nest egg by making an annual contribution of 3% of compensation to a profit-sharing account for eligible employees. Employees are fully vested in the profit-sharing plan after six years.
<b>commute</b>	Since our offices are located in metropolitan areas, commuting and parking can be difficult. We offer our staff a pre-tax transit deduction program in accordance with IRS regulations. These benefits are provided via pre-tax payroll deductions.

