

# Benefits & Programs

A silhouette of a person with their arms outstretched, standing against a bright, hazy sky at sunset or sunrise. The person's head is tilted back, and their arms are spread wide, suggesting a sense of freedom or achievement. The sky is a mix of warm orange and yellow tones with some light clouds.

**Health & Wellness →**

**Education →**

**Work-Life →**

**Financial →**

At Andersen, one of our highest priorities is supporting our people at every stage of life.

We offer a comprehensive benefits package, and our people have the flexibility to choose the types of plans and coverage levels that best meet their needs.

# Benefits &

## Health & Wellness



### Medical

We offer several different medical plans to meet the needs of our people: Cigna Low Deductible Plan, Cigna Medium Deductible Plan, Cigna High Deductible Plan, and Kaiser Permanente HMO (CA, DC, MA, VA, WA only)

### Dental

Employees can choose between two PPO options: Basic or Premium. Both plans provide coverage for preventative care, basic and major services, and orthodontia services.

### Vision

Employees can choose between two vision plans: EyeMed or VSP. Employees enrolled in medical coverage receive vision for free. The plan provides coverage for annual eye exams, lenses, frames, and contacts.

### Flexible Spending Accounts (FSAs)

Our FSAs allow employees the opportunity to set aside pre-tax dollars to pay for qualified health care, dependent care, and commuter expenses. We match \$0.50 of every \$1 contributed to our employees' dependent care accounts, up to \$1,666.67 per year.

### Health Savings Account (HSA)

Those enrolled in the Cigna High Deductible Plan have the opportunity to set aside pre-tax dollars to pay for qualified health care expenses. We will also contribute \$600 for single coverage and \$1,020 for family coverage on your behalf.

### Basic Life and AD&D

Employees receive Basic Life and Accidental Death & Dismemberment coverage equal to two times their annual salary at no cost, up to a maximum of \$2 million. We also offer additional coverage that can be purchased for employees and eligible dependents.

### Long-Term Care

We offer up to \$300,000 in Long-Term Care coverage and life insurance with a guaranteed issue amount of \$80,000.

### Tax Reduction Investment Plan — 401(k)

To help our employees save for retirement, they have the opportunity to contribute pre-tax or after-tax dollars to a 401(k) plan account. Participants are eligible for a company match immediately, and are 100% vested after one year of service. The match is \$0.25 per \$1 on the first 6% of salary contributed.

### Short & Long Term Disability

Our Short-Term Disability plan provides employees replacement of 60% to 100% of pre-disability income up to \$45,000 per week, for up to 25 weeks. Our Long-Term Disability plan replaces up to 60% of pre-disability income, up to \$17,000 per month.

### Employee Assistance Program (EAP)

EAP provides employees and eligible household members unlimited services including counseling, legal and financial services, and assistance with many other life issues.

### Adoption Assistance

Our Adoption Assistance program offers financial support to employees, up to a lifetime maximum of \$10,000.

### Fertility Assistance

We offer employees up to \$12,000 in reimbursements for costs associated with the diagnosis and treatment of infertility, including the inducement of fertilization.

### One Medical Group Membership

We partner with One Medical Group to offer employees access to quality primary care doctors. Same day, next day, and virtual care appointments can be scheduled by phone, app, or online.

### beFIT

We encourage wellness and fun with healthy competitions through our beFIT challenges that take place throughout the year. All employees receive \$100 toward a step tracking device of their choosing upon hire. In addition, participants will earn \$50 for each month in which they average 7,500 steps a day. Non-step activities can be converted to steps so you can participate in your favorite fitness activity.

# Programs

## ANDERSEN®

### Education



#### **USF MLST, LLM, MBA and Tax Writing Programs**

We have a unique partnership with The University of San Francisco that offers employees the opportunity to earn a Master of Legal Studies in Taxation (MLST), a Master of Laws in Taxation (LLM), a Master of Business Administration (MBA); or to participate in a Tax Writing & Research Essentials Program at no cost to them.

Participants can complete a portion of the coursework during business hours to assist them in succeeding in the program.

#### **Student Loan Paydown Plan**

Through our partnership with Gradifi, employees are eligible to receive \$100 per month toward their student loan debt for a maximum duration of five years. At the end of the fifth year, we will pay a lump sum of \$6,000 toward the participant's outstanding loan. Additionally, discounted rates on student loan refinancing are available through partnerships with Gradifi and SoFi.

#### **Tuition Reimbursement**

In an effort to support our people in pursuing higher education, we offer tuition reimbursement up to \$5,250 per year for qualifying courses taken at an accredited university.

#### **Professional Accreditation**

We reimburse employees obtaining professional designation for the exam sitting fee as well as \$2,000 in course training materials or they can receive one full set of Becker CPA review course materials. Employees who pass an approved professional designation exam are eligible to receive a bonus of \$5,000.

### Work-Life



#### **Paid Time Off & Holidays**

Full-time employees receive a minimum accrual of 20 days per year based on length of service with Andersen and/or job level. In addition, we offer 12 paid holidays throughout the year.

#### **Modified Work Arrangement (MWA)**

To help our employees balance their personal and professional lives, we offer an MWA. Employees can apply for an MWA when personal needs for flexibility arise.

#### **Back-Up Care Program**

We provide employees access to 10 days of firm-subsidized back up child, adult, and elder care through Bright Horizons. Employees can also use two of these days for pet care with a Rover pet sitter.

#### **Breast Milk Delivery Service**

Breastfeeding employees have access to Milk Stork, a service that allows you to ship your breast milk home while you are traveling for business.

#### **Travel Assistance**

We offer 24-hour emergency travel assistance, including emergency medical assistance and personal assistance, for employees and dependents while traveling more than 100 miles from home, domestically, and abroad.

#### **Pet Insurance**

We offer discounted pet insurance for your cat, dog, bird, or exotic pet through Nationwide. There are two plan levels available, one that offers coverage for accident or illness, and one that also covers wellness care such as spay and neuter, vaccination, flea and tick protection, and more.

#### **myGiving**

We are passionate about making an impact on our community. Through our myGiving philanthropy program, employees' donations are matched up to \$250 a year to charities of their choice. Employees are also able to take 32 paid hours a year to volunteer in their communities.

#### **Paid Bonding**

We provide employees welcoming new babies to their families with up to 10 weeks of paid bonding time.

#### **SNOO**

We offer free SNOO rentals for new parents. Employees can also rent a SNOO on behalf of a friend or family member at a discounted rate.

#### **Other Benefits Offered**

Through partnerships with multiple vendors, we offer discounted rates on identity protection and legal services.

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## § Financial

### Andersen Loyalty Program

Our Loyalty Program is a discretionary cash incentive program that allows the firm's Managing Directors to recognize and reward individuals who make a sustained contribution to the success and growth of the firm. Associates through Directors who have been employed with Andersen for at least five years are eligible to receive a bonus of \$35,000 (practice management support professionals are eligible to receive \$17,500).

### Directory Phantom Unit Plan (DPUP)

The Director Phantom Unit Plan is a unique and one-of-a-kind program in our industry. This program grants phantom units of Andersen Tax LLC to eligible Directors of Andersen as additional compensation. Income is calculated based on the firm's earnings and can grow substantially during your tenure as a Director.

### Referral Bonus Program

We encourage all active employees to refer candidates for employment. For those candidates who are subsequently hired, the referring employee can receive a bonus ranging from \$1,500 to \$20,000, depending on the level of hire.



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## ✓ Eligibility

All regular full-time and part-time employees who are scheduled to work 20 or more hours per week are eligible to participate in the Andersen myBenefits Program.

Benefits begin on the first of the month following the date of hire. Participation in the 401(k) plan will begin after 30 days of employment.

*This overview shows only the highlights of our employee benefits and programs. This is not a complete, detailed description, nor is it a contract of employment or a guarantee of benefits. The Firm reserves the right to amend or terminate the program in whole or in part at any time.*