

RSM US Alliance Member Brand Guidelines

A guide to our brand identity system

Last updated: March 2020

RSM US Alliance



A message from your RSM US Alliance team

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An independently owned member **RSM US Alliance**



RSM

The visual presentation of our RSM US Alliance brand is closely linked to the RSM brand. The RSM US Alliance member signature is composed of the RSM brand identity linked to a unique rendition of our name, RSM US Alliance, and the descriptor, An Independently Owned Member, to ensure appropriate representation of independence between our organizations.

Our brand will have the greatest impact when used consistently and correctly. To be successful, we must all learn how to properly use the RSM US Alliance brand in marketing and communications materials. This guide describes our identity and landmark elements and gives you the guidelines for using the new visual identity system and legal disclosures. Please read it carefully and keep it handy for future reference.

Our RSM US Alliance brand is a valuable asset for both RSM US LLP and our RSM US Alliance member firms. We are proud of our affiliation with your firm and when the brand is used correctly it will help us build awareness and solidify the reputation of our firms. When your firm chooses to use the RSM US Alliance brand, you must promote and protect it by following the guidelines in this guide.

Dean Sengstock

National Leader, RSM US Alliance

For more information, contact:

Member Desk

E: RSMUSAlliance@rsmus.com

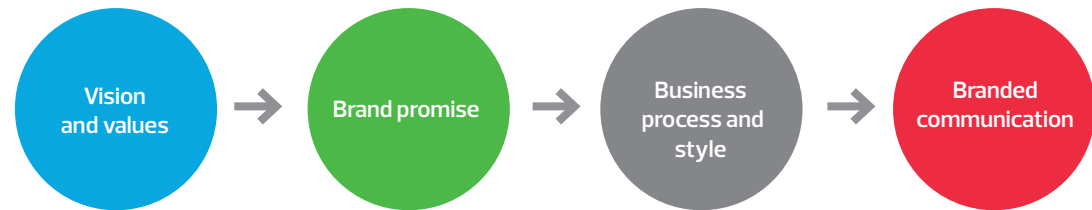
1.0

RSM US ALLIANCE BRAND

- 1.1 The importance of branding
- 1.2 RSM US Alliance brand architecture
- 1.3 Continuity in branding

Brands are not built by accident...at least not good brands. Strong brands are built through discipline and active management. Building a brand means making a promise and sticking to it in everything you do. With a strong brand platform, you always know what is expected of us as members of the RSM US Alliance. More importantly, it helps clients and prospects know what to expect.

At its heart, branding is a commitment to deliver on a specific promise.



A brand is not a logo. It's not even a combination of colors and images. Rather, it is the perceptions about an organization in the minds of clients and stakeholders (e.g., employees, partners, etc.). At its heart, branding is a commitment to deliver on a specific promise. All brands are built over time as a result of cumulative experiences people have with the services or products offered under the brands. Each time a client interacts with people, sees ads or reads newsletters associated with the RSM US Alliance brand, his or her opinion of the RSM brand is influenced. This guide illustrates some of the ways we tell our brand story.

RSM US Alliance



RSM

RSM Alliance



RSM

RSM Alliance and RSM US Alliance internal signatures

The RSM Alliance and RSM US Alliance signatures will be used specifically by RSM US LLP personnel to represent the RSM US Alliance organization in communication, advertising and promotional materials for the benefit of all U.S. and Canada members and prospects. You will see it displayed on general business communication templates, merchandise/apparel, website or internal applications such as our member portal.

An independently owned member

RSM US Alliance



RSM

RSM US Alliance member signature

The RSM US Alliance member signature may be used by RSM US Alliance members in their respective marketing and communication materials, and must be used if any such materials reference the member firm's affiliations with RSM US LLP or RSM US Alliance. Members of RSM US Alliance can benefit from our brand identity by communicating their affiliation with RSM US LLP and capitalizing on the power that this association with a premiere audit, tax and consulting provider brings.

Remember, consistency drives awareness and understanding.

Communicating our key messages throughout our marketing materials drives credibility and reflects our brand.

From the legal disclosures to the fonts used to typeset them, these elements make up our identity system and help us create brand-supported and consistent communications. Straying from our standard messaging and visuals dilutes the brand effort.

A lot of thought and effort has gone into the development of our identity. To successfully build a strong brand and maximize the return on our investment, we need to work together to adhere to the usage guidelines outlined in this guide. We have adopted a zero tolerance enforcement policy for these standards.

2.0

EXPRESSING THE RSM US ALLIANCE BRAND

- 2.1 RSM US Alliance member signature
- 2.2 Sizing and spacing of signature
- 2.3 RSM US Alliance brand colors
- 2.4 RSM US Alliance brand colors (continued)
- 2.5 Incorrect use of the RSM US Alliance member signature
- 2.6 Incorrect use of the RSM US Alliance brand colors
- 2.7 Background control
- 2.8 Brand restrictions

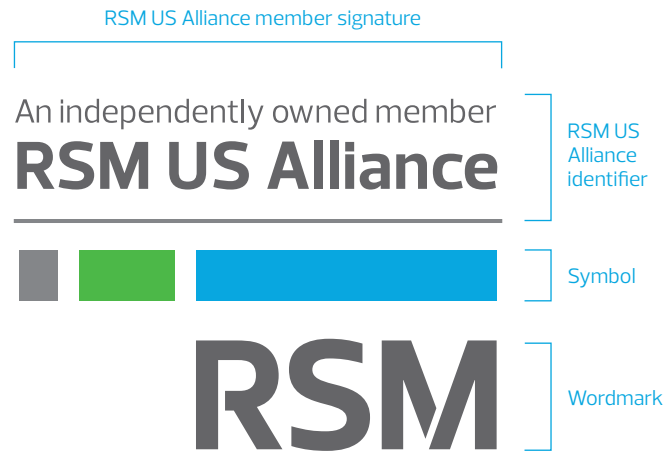
The RSM US Alliance member signature has been designed for maximum legibility, impact and memorability. The letters of our wordmark and the RSM US Alliance member signature are proprietary drawings and must not be recreated.

The member signature elements are arranged in a specific relationship to each other. They must not be changed or altered in any way.

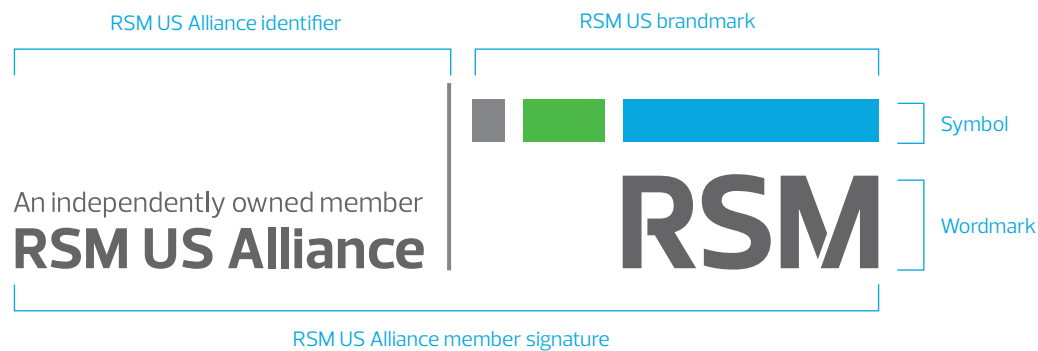
For authorized reproduction of artwork, information or clarification:

Visit the Promoting Your Membership page under Marketing Tools on the RSM US Alliance portal (<http://alliance.rsmus.com>).

**Vertical
signature**



**Horizontal
signature**



Area of isolation

The RSM US Alliance member signature should always be surrounded by a generous amount of open space. This will keep it free of distracting or competing graphic elements.

The minimum amount of open space surrounding the signature is shown here. Use more space whenever possible, especially when there are other competing graphic elements near the signature.

Note:

The "X" dimension is equal to the symbol height.

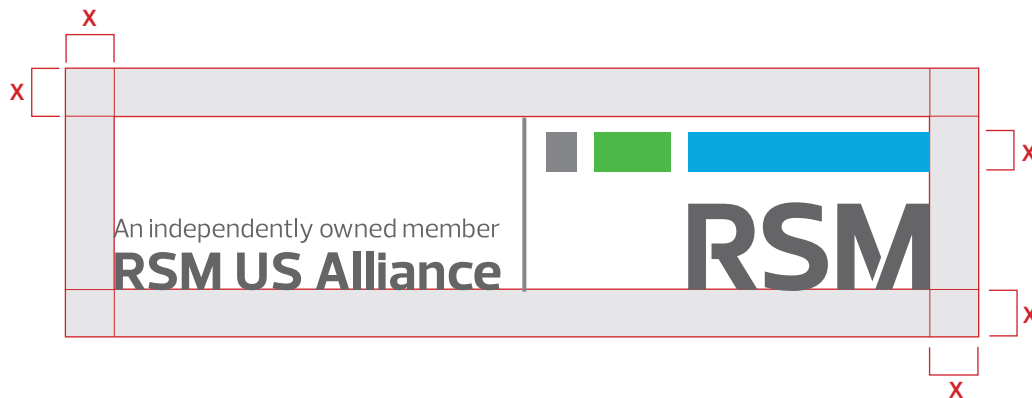
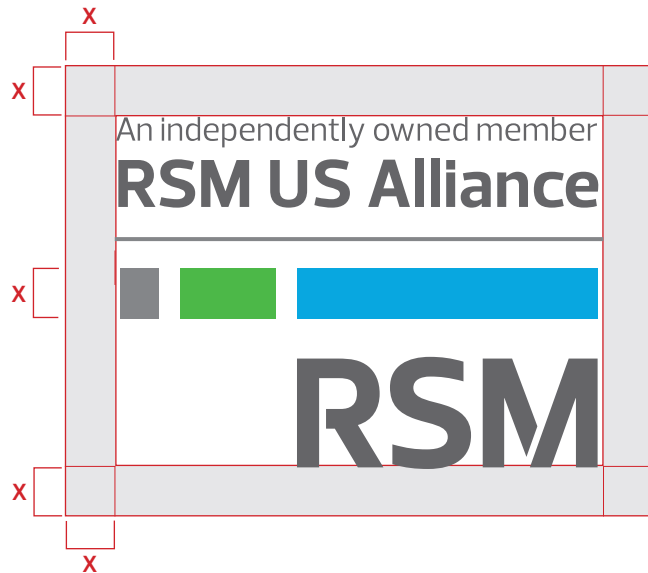
Size of signature

Minimum: The minimum recommended size for print and on-screen communications is .25" (6.35mm) and 18 pixels for internet use of the RSM US portion of the signature. This way the icon rectangles still appear separated.

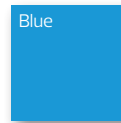
.25"  RSM

Maximum: There is no maximum recommended signature size provided it is easily legible to the intended audience and the minimum clear space is maintained.

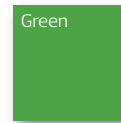
Never reproduce the signature at less than minimum recommended size without approval from RSM US LLP corporate marketing. Never scale the signature disproportionately or at a size that compromises legibility in any medium.



The approved colors for the RSM US Alliance member signature are demonstrated here. These standards apply to all applications. Other colors, values or gradations are not permitted.



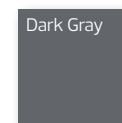
Pantone* 2925
CMYK 75, 15, 0, 0
RGB 0, 156, 222
Hex# 009cde



Pantone 362
CMYK 70, 0, 100, 0
RGB 63, 156, 53
Hex# 3f9c35



Pantone Cool Gray 8
CMYK 0, 0, 0, 58
RGB 136, 139, 141
Hex# 888b8d



Pantone Cool Gray 10
CMYK 0, 0, 0, 74
RGB 99, 102, 106
Hex# 63666a

**Pantone Inc.'s check-standard trademark for color reproduction and color reproduction materials.*

Positive

Full color

Symbol: Blue (Pantone 2925), Green (Pantone 362) and Mid Gray (Pantone Cool Gray 8)

Wordmark: Dark Grey (Cool Grey 10)

RSM US Alliance identifier: Gray (Pantone Cool Gray 10)

An independently owned member

RSM US Alliance



Positive

One color: 100% black

An independently owned member

RSM US Alliance



Reverse on dark color background**All elements:** White**Positive on light color background****All elements:** Black

Do not alter any portion of the RSM US Alliance member signature. Any variation of the RSM US LLP signature or RSM US Alliance member signature will weaken the effectiveness of the RSM US Alliance program, and diminish the strength of our brand and potentially puts our brand affiliation at risk.



Don't
use the RSM trademark.



Don't
replace the signature with any other graphic



Don't
outline the signature



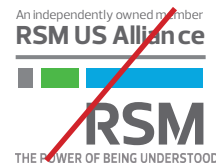
Don't
alter the original RSM trademark



Don't
use the internal RSM Alliance trademark



Don't
use the former McGladrey trademark



Don't
add any other descriptors



Don't
alter the weight of the signature



Don't
use the member signature without the symbol.



Don't
use the member signature without the RSM trademark



Don't
put shadows or other graphic elements behind the signature

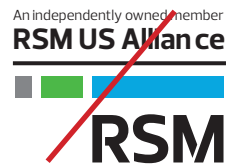


Don't
distort the signature

The RSM US Alliance member signature colors have been carefully chosen. Consistent use of these colors is imperative.

Incorrect use of color reduces the visual recognition and impact of the RSM US Alliance member signature and diminishes its effectiveness in identifying our affiliation.

Examples of incorrect color usage are shown here.



Don't
print the wordmark in black



Don't
print the signature in all green



Don't
fill the signature with a gradient



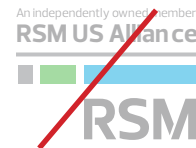
Don't
print the signature in white on a light background that doesn't offer sufficient contrast



Don't
print the signature in all blue



Don't
print the signature in any unauthorized color



Don't
use a transparency option

The RSM US Alliance member signature must always be presented as clearly as possible. For this reason, backgrounds must be controlled to ensure proper contrast.

Tip

If using a full-bleed graphic, consider screening it back in the area behind the RSM US Alliance member signature. See the illustration in right column.

Acceptable

Positive application

White or light background to 15% black or equivalent (darkest usable)



Reverse application

Black background to 50% black or equivalent (lightest usable)



Unacceptable

Positive application

Don't

print the signature against a dark or heavily textured background



Reverse application

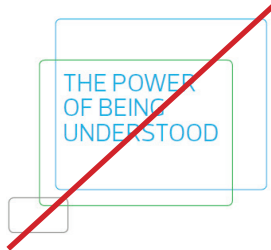
Don't

reverse the signature out of a complex photograph or background that does not offer sufficient contrast.





Don't
use the RSM portraiture imagery



Don't
use the Power of being understood
brand positioning statement or insight
graphic



Don't
use the RSM progress bar graphic



Don't
use RSM illustrations

“The Power of Being Understood” brand positioning statement

The Power of Being Understood brand positioning statement is a trademark owned by RSM US LLP and is to be used solely by RSM. RSM US Alliance member firms are not permitted to use this tagline in any capacity (marketing or otherwise, except if it is printed on allowable RSM US LLP-generated promotional materials).

RSM design elements

With the RSM brand transition in October 2015, RSM unveiled a new look and feel for all marketing and communication materials. These design elements (including but not limited to: font/typography, the progress bar, insight graphics, illustrations and primary portraits/photos) represent the RSM brand. For clarity in independence as well as brand integrity, RSM US Alliance member firms are not permitted to copy or recreate these design elements in any capacity (marketing or otherwise, except if printed on allowable RSM US LLP generated promotional materials).

RSM US Alliance restrictions outside the United States

The RSM US Alliance is a U.S.-based association that has access to resources of an international network through the RSM US Alliance license agreement with RSM US LLP. The licensee may not reference the RSM US Alliance relationship when doing business outside the United States unless as part of an international engagement the licensee is working on with other members of the RSM International network.

Additional restrictions

In addition to the brand guidelines provided in this book, please reference your firm's license agreement for any marketing/branding restrictions that are specific to your firm.

3.0

PUTTING THE PIECES TOGETHER: COMMUNICATIONS MATERIAL

- 3.1 Using the RSM US Alliance member signature
- 3.2 Standard legal disclosure
- 3.3 Short legal disclosure
- 3.4 Letterhead and business cards
- 3.5 Press releases
- 3.6 Advertising and marketing materials
- 3.7 Presentations (PowerPoint)
- 3.8 Website
- 3.9 Email signatures
- 3.10 Signage
- 3.11 Member affiliation in text only
- 3.12 Proposals and arrangement letters

We recommend that the RSM US Alliance member signature be used on all member communications materials, from stationery to marketing communications.

The following exhibits graphically illustrate the recommended relationship between a member's own brand identity and how the RSM US Alliance member signature may be incorporated into their communications. We have used the LaPorte CPAs & Business Advisors logo to show the recommended relationships. While each member has unique brand requirements, we believe that the more consistent members are in using the guidelines described on the following pages, with special emphasis on the core brand elements of RSM US Alliance, the greater the value to each and all members.

The vertical signature configuration is preferred and is shown in the majority of the following exhibits. However, when there is limited vertical space, the horizontal signature is acceptable.

Always observe the area of isolation surrounding the RSM US Alliance member signature. For more information, refer to Page 2.2.

Preferred, vertical signature

An independently owned member

RSM US Alliance



Acceptable, horizontal signature

An independently owned member

RSM US Alliance



Standard RSM US Alliance disclosure

Usage

The standard RSM US Alliance disclosure is required on all marketing materials 8.5" x 11" or larger if RSM US Alliance is referenced within the document or if the RSM US Alliance member signature is used.

Standard RSM US Alliance disclosure:

RSM US Alliance provides its members with access to resources of RSM US LLP. RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International. The RSM™ trademark is used under license by RSM US LLP. RSM US Alliance products and services are proprietary to RSM US LLP.



RSM US Alliance provides its members with access to resources of RSM US LLP. RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax, and consulting firms. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International. Visit rsmus.com/about-us for more information regarding RSM US LLP and RSM International. The RSM™ logo is used under license by RSM US LLP. RSM US Alliance products and services are proprietary to RSM US LLP.

Short RSM US Alliance disclosure

Usage

The short RSM US Alliance disclosure may be used only on letterhead and on advertising and marketing materials that are smaller than 8.5" x 11" when RSM US Alliance is referenced within the document or if the RSM US Alliance member signature is used.

Short RSM US Alliance disclosure:

RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International.



Illustrated on this page is the use of the horizontal signature on LaPorte letterhead, at the bottom of the sheet. The RSM US Alliance member signature may appear anywhere on a letterhead, depending on the specific layout of the member letterhead and how prominently the member wishes to feature their affiliation with RSM US Alliance.

RSM US Alliance disclosure:

If the member references its affiliation with RSM US Alliance or uses the RSM US Alliance member signature logo, the short disclosure is required. However, the standard disclosure is preferred.

Minimum size:

The minimum size of the RSM US Alliance member signature on all marketing materials 8.5" x 11" or larger is 2.5" for horizontal signatures. 0.75" for vertical signatures.

The minimum size of signatures on all marketing materials smaller than 8.5" x 11" is 1.5" for horizontal signature and 0.75" for vertical signatures.

Minimum font size: 5.5 pt.

Business cards

On vertical cards, the minimum vertical width is 0.75". On horizontal cards, the minimum horizontal width is 0.75". Neither disclosure is required on business cards.



While the horizontal signature is shown in this press release exhibit, the vertical signature is acceptable depending on the specific layout of a member's press release.

If the RSM US Alliance affiliation is mentioned in the member's press release, the RSM US Alliance boilerplate is required immediately following the press release text in the same size font and color. Visit the member portal (<https://alliance.rsmus.com/tools/marketing/Pages/BrandToolkit.aspx>) for updated stats.

RSM US Alliance boilerplate:

RSM US Alliance (rsmus.com/alliance) is a premier affiliation of independent accounting, consulting and professional services firms in the United States, with more than [XX] members in over [XX] states, the Cayman Islands and Puerto Rico. RSM US Alliance provides its members with access to resources of RSM US LLP, the leading provider of audit, tax and consulting services focused on the middle market, with more than [XXXX] people in [XX] offices nationwide. RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International. For more information, call toll free +1 800 537 7178 or visit rsmus.com/alliance.



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Houston, TX 77056
713.963.8008 | Fax 713.963.9052
LaPorte.com

FOR IMMEDIATE RELEASE

CONTACT:
Tom Smith, President/CEO
W 000.000.0000 | tsmith@laporte.com
Jane Doe, Marketing
W 000.000.0000 | jdoe@marketing.com

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ac sem odio, eget elementum mauris.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ac sem odio, eget elementum mauris. Nam ut interdum ante. Ut pulvinar lacinia sodales. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Suspendisse cursus imperdiet libero tincidunt faucibus. Donec aliquam mollis ligula sit amet consequat. Proin a leo in ligula rutrum pharetra. Nullam nibh nibh, tincidunt ac tempus in, interdum et nisi. Donec vestibulum metus ut eros convallis non pellentesque nibh congue. Fusce et urna ut nulla feugiat luctus.

Curabitur sed elit eget nulla viverra posuere. Vestibulum et tellus sed dui molestie imperdiet. Nulla sed lorem non odio viverra elementum. In pretium tempor sem in viverra. Integer lectus leo, tincidunt at rutrum sit amet, luctus at nunc. Cras ac massa vel lorem ultrices gravida a in nisl. In nec neque ut nisi dignissim imperdiet. Donec suscipit fermentum risus ut hendrerit. Nulla facilisi. Proin sit amet odio risus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Pellentesque tempor pharetra urna vel elementum. Cras aliquam dignissim felis, non vehicula metus suscipit ac. Curabitur placerat mattis ipsum.

About the RSM US Alliance:
 RSM US Alliance ([www.rsmus.com/alliance](https://rsmus.com/alliance)) is a premier affiliation of independent accounting and consulting firms in the United States, with more than 75 members in over 38 states, the Cayman Islands and Puerto Rico. RSM US Alliance provides its members with access to resources of RSM US LLP, the leading provider of audit, tax and consulting services focused on the middle market, with more than 9,000 people in 90 offices nationwide. RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International. For more information, call toll free 800.537.7178 or visit rsmus.com/alliance.

-MORE

NEW ORLEANS HOUSTON BATON ROUGE COVINGTON

An independently owned member
RSM US Alliance



RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax, and consulting firms. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International.

Boilerplate

RSM US Alliance disclosure:

Except for business cards, all advertising that references RSM US Alliance or contains the RSM US Alliance member signature must include a RSM US Alliance disclosure.

The standard RSM US Alliance disclosure is required on all marketing materials 8.5" x 11" or larger if RSM US Alliance is referenced within the document or if the RSM US Alliance member signature is used.


The short RSM US Alliance disclosure may be used only on letterhead and on advertising and marketing materials that are smaller than 8.5" x 11" when RSM US Alliance is referenced within the document or if the RSM US Alliance member signature is used.

Minimum size:

The minimum size of the RSM US Alliance member signature on all marketing materials 8.5" x 11" or larger is 2.5" for horizontal signatures and 0.75" for vertical signatures.

The minimum size of signatures on all marketing materials smaller than 8.5" x 11" is 1.5" for horizontal signatures and 0.75" for vertical signatures.

Minimum font size: 5.5 pt.



**Confidence won't grow
from a superficial understanding
of your business.
LaPorte goes deep.**

When you talk, we listen. But we don't stop there. We go deeper to uncover important accounting, tax, and advisory needs. LaPorte invests the time and tools to provide strategic, long-term guidance and to build enduring relationships. Combine that with our industry expertise, national and international resources, and proactive service—and you walk away with something substantial: deep confidence in your CPA firm.

CALL US AT:
504.835.5522 (New Orleans)
985.892.5850 (Northshore)

TOP
VOLUME
PLACES
2016

CRIB
Business
1
Best Places
to Work

2015
TOP
200
FIRMS

LA PORTE
CPAs & BUSINESS ADVISORS
LOUISIANA • TEXAS
LaPorte.com
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RSM US Alliance provides its members with access to resources of RSM US LLP. RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax, and consulting firms. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International. Visit rsmus.com/about-us for more information regarding RSM US LLP and RSM International. The RSM™ trademark is used under license by RSM US LLP. RSM US Alliance products and services are proprietary to RSM US LLP.

Boilerplate

As an independent member firm of RSM US Alliance

RSM

This PowerPoint footer features both the member's logo and the RSM US Alliance member signature in its horizontal format. A one-color or a full-color signature may be used. The size and position of the RSM US Alliance member signature may vary depending on the layout of the member's slide format.

RSM US Alliance disclosure:

RSM US Alliance member PowerPoint presentations using the RSM US Alliance member signature must include the short RSM US Alliance disclosure.

Minimum size:

1.5" for horizontal signature and 0.75" for vertical signature.

Minimum font size: 5.5 pt.

Boilerplate

Header

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

- Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.
- Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.
- Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem.

Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur.

RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax, and consulting firms. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International.



LAPORTE
CPA & BUSINESS ADVISORS

An independent member
RSM US Alliance



1

The member's website home page may feature the RSM US Alliance member signature either close to the member's logo or separate from it. Please observe the area of isolation surrounding the RSM US Alliance member signature. For more information, refer to Page 2.2.

RSM US Alliance disclosure:

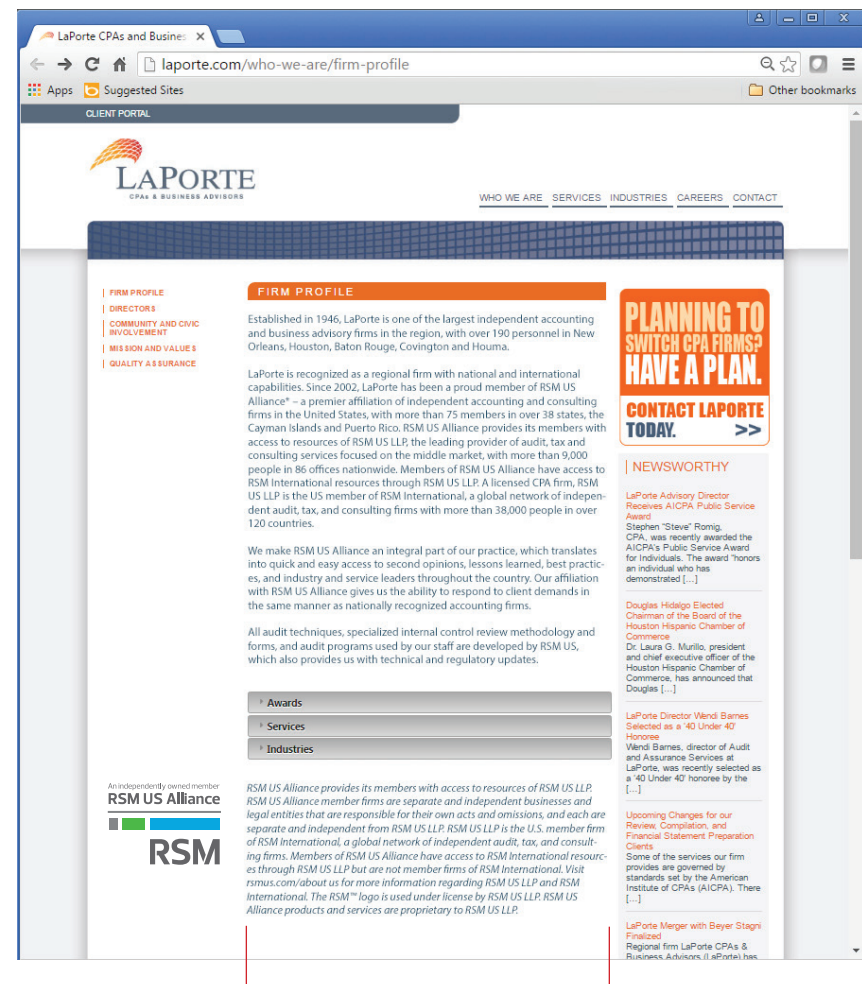
The standard RSM US Alliance disclosure is required if the member's website contains the RSM US Alliance member signature or references RSM US Alliance. The disclosure can be on the same page as the RSM US Alliance member signature or the reference to RSM US Alliance, or it can be viewed via a hyperlinked disclosure page.

Minimum size:

100 pixels for vertical signatures

175 pixels for horizontal signatures

Minimum font size: 5.5 pt.



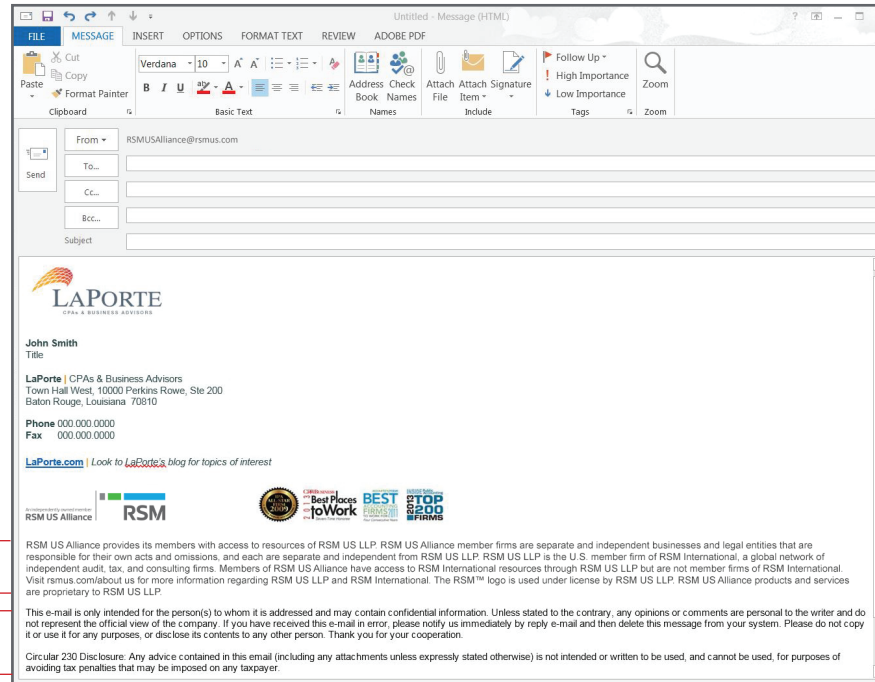
Boilerplate

If the RSM US Alliance member signature or text-only identification is used, the standard RSM US Alliance disclosure is required at the bottom of the email.

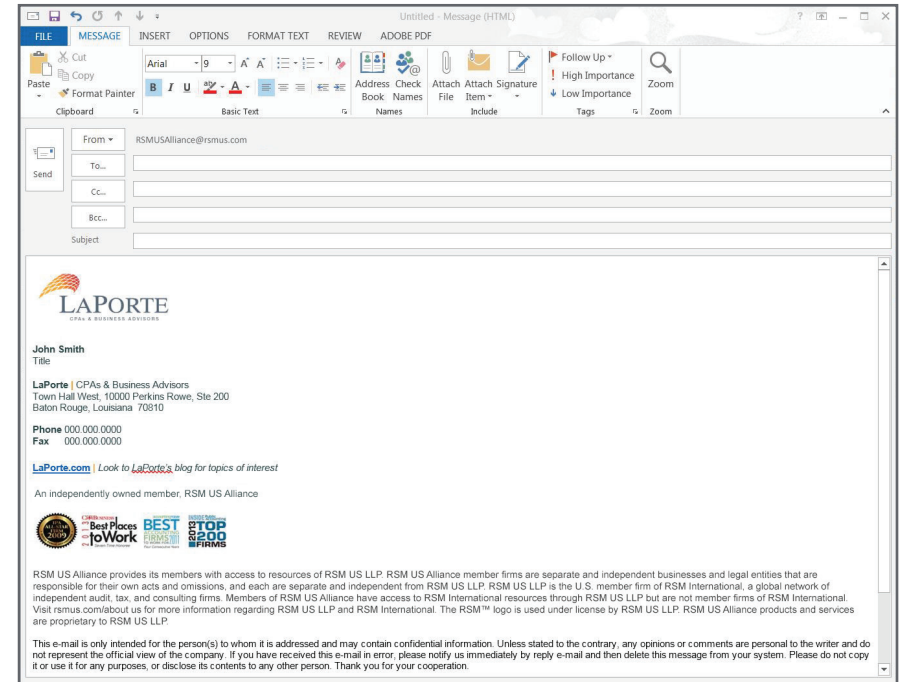
These email footers feature both a text-only example and an example using the RSM US Alliance member signature in its horizontal format.

A one-color or a full-color signature may be used in either the vertical or horizontal configuration. The size and position of the RSM US Alliance member signature may vary depending on the layout of the member's email format.

Email signature with member signature



Email signature with text only



Well-coordinated signage is an effective method of creating a solid brand identity. The primary sign in reception rooms may or may not contain the RSM US Alliance member signature. In certain situations, it may be desirable to have the RSM US Alliance member signature on a separate desktop sign. However, the standards that define the use of the RSM US Alliance member signature must be followed. Refer to section two, *Expressing the RSM US Alliance brand* for details.



An RSM US Alliance member may choose not to use the RSM US Alliance member signature on their materials. In that case, members may identify their affiliation with RSM US Alliance in a text-only treatment displayed in the type font that the member currently uses in their communications material. This text only identification should read:

An Independently Owned Member, RSM US Alliance

A two line treatment is also acceptable:

An Independently Owned Member,
RSM US Alliance

The text-only identification must be set in upper and lower case as shown above. All caps is not acceptable.

RSM US Alliance disclosure:

If the member references its affiliation with the text-only identification, the short RSM US Alliance disclosure is required on letterhead and on advertising and marketing materials that are smaller than 8.5" x 11".

The standard RSM US Alliance disclosure is required on all marketing materials 8.5" x 11" or larger.

Minimum size:

10 pt. on all marketing materials 8.5" x 11" or larger

6 pt. on all marketing materials smaller than 8.5" x 11"

Minimum font size: 5.5 pt. on all marketing materials 8.5" x 11" or larger and 4 pt. on all marketing materials smaller than 8.5" x 11"

Business cards

Due to space limitations RSM US Alliance member firms are not required to insert a disclosure even if the RSM US Alliance member signature or text-only identification is present on the business card.

Standard
disclosure



In order to accurately describe the member firm's affiliation with RSM US Alliance and make clear the member firm has the sole and ultimate responsibility for the engagement, the member must accurately reference its affiliation with RSM US Alliance and RSM US LLP, respectively, when referencing such application in all proposals and engagement letters.

Sample proposal language

[RSM US Alliance member name] has been a proud member of RSM US Alliance since [year]. RSM US Alliance is a premier affiliation of independent accounting, consulting and professional services firms in the United States, with more than [XX] members in over [XX] states, the Cayman Islands and Puerto Rico. This affiliation gives us access to a full range of national and international capabilities.

As a member of RSM US Alliance, [RSM US Alliance member name] has access to resources and services RSM US LLP provides its own clients. RSM US LLP is the leading provider of audit, tax and consulting services focused on the middle market, with more than [XXX] people in [XX] offices nationwide. RSM US LLP 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 [XXX] people in over [XXX] countries.

We accepted an invitation to become a member of RSM US Alliance because it is a natural fit with our commitment to our clients and our determination to stay at the forefront of developments affecting accounting, consulting and professional services firms today. Visit rsmus.com/alliance to learn more about our membership.

RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International. RSM, the RSM brandmark and RSM US ALLIANCE are trademarks of RSM International Association or RSM US. The services and products provided by RSM US Alliance are proprietary to RSM US LLP.

Sample arrangement letter language

RSM US LLP will be available to support [name of firm] by rendering services related to the performance of the engagement. If a situation occurs in connection with the proposed engagement for which we would request the services of RSM US LLP, we will notify you and obtain permission from you before giving access to your records. We maintain supervision, control and ultimate responsibility for the performance of this engagement.

[RSM US Alliance member name] is independently owned and operated and assumes full responsibility for the quality of service delivered to our clients. We are responsible for our own client fee arrangements and maintenance of our client relationships.

RSM US Alliance provides its members with access to resources of RSM US LLP. RSM US Alliance member firms are separate and independent businesses and legal entities that are responsible for their own acts and omissions, and each are separate and independent from RSM US LLP. RSM US LLP is the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. Members of RSM US Alliance have access to RSM International resources through RSM US LLP but are not member firms of RSM International. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International. RSM, the RSM brandmark and RSM US ALLIANCE are trademarks of RSM International Association or RSM US. The services and products provided by RSM US Alliance are proprietary to RSM US LLP.

4.0

REPURPOSING RSM US LLP CONTENT

- 4.1 Cover letter for existing documents
- 4.2 Using RSM US LLP content in your own materials

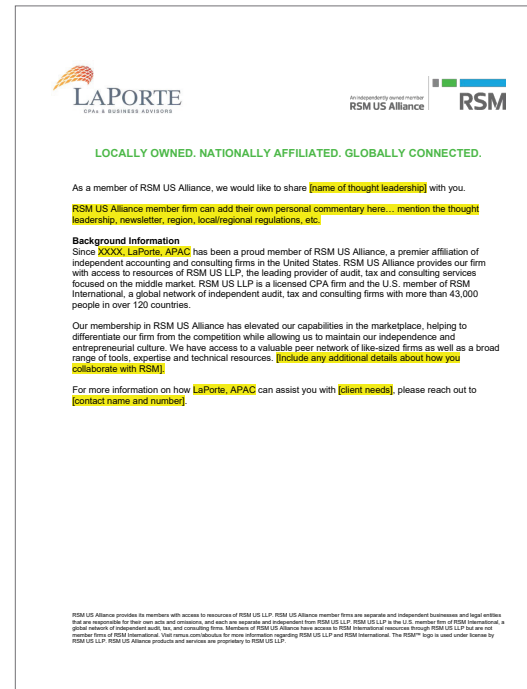
As a RSM US Alliance member, you may re-use RSM US LLP (RSM) authored content including articles, white papers, and other forms of thought leadership with your clients and prospects—on your own website, in print, or otherwise. Download the [cover letter template](#) to help leverage your RSM US Alliance membership with any piece of RSM collateral or thought leadership.

Please be sure to follow the requirements below.

If you have any questions or would like assistance, please contact the [Member Desk](#).

1. Do not edit the text in any way, place it exactly as it appears so that it does not deviate from what has been reviewed by RSM subject matter experts, legal team and other approvers.
2. Include the attribution language that credits RSM and, where there is one, the author as the source of this content.
3. When referencing your affiliation with RSM US Alliance, be sure to follow the guidelines in this document and use the proper legal disclosures.

Cover letter



White papers and articles



Web/email requirements

Guidelines for repurposing RSM US LLP content on your website or via email.

1. Do not repost the entire article on a landing page or website (this will negatively effect search engine optimization).
2. For web landing pages, post the first paragraph of the article with a "read more" link back to the original content on rsmus.com.
3. For email, write an introductory statement or paragraph highlighting why you think this piece may be of interest to your reader.
4. Credit the author with the appropriate attribution language (see right).
5. Include all relevant disclaimer language (see right).

Print requirements

Guidelines for repurposing RSM US LLP content in your own publications and materials.

1. Place the unedited copy in your publication.
2. Credit the author with the appropriate attribution language (see right).

Sample attribution styles:

Option 1: Text included in a news story on your web site should state the following:

Source: RSM US LLP
Used with permission as a member of RSM US Alliance
Link to original content URL

Option 2: Sample byline:

This article was written by [Author] and originally appeared in the [MMYYYY] RSM US [NL Name], and is available online at [article URL].

Tax content disclaimer:

The following disclaimer must be used in addition to the RSM US Alliance legal disclosure when repurposing tax content from RSM.

The information contained herein is general in nature and based on authorities that are subject to change. RSM US LLP guarantees neither the accuracy nor completeness of any information and is not responsible for any errors or omissions, or for results obtained by others as a result of reliance upon such information. RSM US LLP assumes no obligation to inform the reader of any changes in tax laws or other factors that could affect information contained herein. This publication does not, and is not intended to, provide legal, tax or accounting advice, and readers should consult their tax advisors concerning the application of tax laws to their particular situations. This analysis is not tax advice and is not intended or written to be used, and cannot be used, for purposes of avoiding tax penalties that may be imposed on any taxpayer.

5.0

Resources and tools

5.1 Resources and tools

5.2 Brand checklist

**RSM US Alliance portal**

All brand guidelines and brandmark art files can be found in the marketing section under tools on the RSM US Alliance Portal (<https://alliance.rsmus.com>).

Identity system and general guideline questions:**Member Desk**

E: RSMUSAlliance@rsmus.com



If you have an idea or request and want to notify us, please contact our Member Desk.

Overall

- Have you consulted with your internal marketing resource to ensure your project complies with your firm's overall branding standards?
- If you are using the RSM US Alliance member signature, have you reviewed the RSM US Alliance brand guidelines to ensure your project complies with our brand identity standards?

Signature

- Have you used the RSM US Alliance member signature in a form that meets our approved identity standards?

Disclosures, trademarks, copyrights

- Have you included all of the necessary legal disclosures and appropriate trademark and copyright notices?

Communications guidelines

- Are visuals large? Will they generate interest from your audience?
- Did you consider using photography to add greater drama to your pieces?
- Do your visuals include people and reflect a multicultural focus?
- Is your page layout organized and easy to follow?
- Are headlines straightforward and do they promise a benefit?
- Does the tone of the copy match the subject matter?
- Is the vocabulary you are using simple and easy to understand?

If the answers are "yes" to all of these questions, your project may well be on its way to a successful completion. Remember, these guidelines are designed to protect our brand and leverage its strengths.

RSM US Alliance



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