

# Incentives, Allowances, & Other Experiences

At Siegfried, our people are empowered to design their path to financial freedom, which is why we have an entrepreneurial, **total compensation** approach, which combines a competitive base salary with several energizing incentives, allowances, and other experiences. Over the last five years, our Professionals have earned an average of 40% of their base salary in incentives, with the opportunity to earn in excess of 50% of their base salary.

## Incentives



As part of our **MY Journey® Incentives**, you could earn:

- Up to \$3,750 annually related to our MY Leadership Program.
- Up to \$7,500 annually related to our MY Relationships™ Program.



As part of our **Client Service Incentive Plan**, you could earn:

- Between \$17,000 – \$27,000<sup>1</sup> for meeting billable expectations (48 hours average).
- Additional vacation days may also be earned.<sup>2</sup>
- 3% of net billed fees after three months on the same, revenue-generating project; increase to 5% after 12 months on the same, revenue-generating project.
- Up to 30% of base salary in travel incentives based on qualified overnight stays.<sup>3</sup>
- Up to \$6,750 in additional incentives related to Strategic Service Offering (SSO) projects.



As part of our **Recruiting & Business Development Incentive Plans**, you could earn:

### Recruiting

- \$1,250 for each referral interview and \$11,250 – \$16,250 for each hire secured as part of our Referral Appreciation Program (RAP).<sup>4</sup>
- Exciting weekend trips (valued at \$2,500) for every two hires secured, as well as Experience of a Lifetime trips (valued at \$10,000) for every three hires secured.<sup>5</sup>
- An additional \$10,000 bonus for every five hires secured, plus added bonuses for select hires up to \$2,500.<sup>6</sup>
- Additional vacation days for each hire secured.<sup>2</sup>
- You don't need to wait! Anyone not employed by Siegfried can earn up to \$10,000 through our External Referral Appreciation Program (ERAP).

### Business Development

- \$250 – \$1,250 for setting up a meeting with a potential buyer(s).
- \$5,000 – \$25,000 for introductions that lead to closed business.



As part of our **other incentive** plans, you could earn:

- Up to \$10,000 annually by becoming a Team Leader and supporting a team of 6 – 8 Professionals.
- Up to \$9,000 annually by becoming a Technical Leader and supporting our Professionals and members of the Firm with technical research and support activities.
- Up to \$6,000 annually by becoming a Relationship Team Leader and mentoring Professionals around the MY Relationships™ Program.

## Allowances & Other Experiences

- Up to \$5,000 in an “In Lieu of Travel” (ILOT) bank.
- \$40 per month cell phone reimbursement for business use of a personal cell phone.
- \$750 Live Well Be Well allowance for health and wellness related activities and purchases<sup>7</sup>.
- \$500 Professional Development Allowance (PDA)<sup>7</sup>.
- Allowance for building and enhancing network as part of our Beaker Enhancement Budget (BEB).
- Periodic Firm-sponsored travel to compelling locations for events such as Orientation, Leadership Development Program, and our National Summit.
- License renewals for CPA / CA and other relevant certifications.
- Access to Checkpoint Learning, Workday Learning, and other CPE/professional development activities.
- Firm-hosted live and virtual CPE events.
- Digital agility upskilling with access to programs like PwC ProEdge.
- Specialized education for systems like Tableau®, Alteryx, Power BI, and Workiva.
- Microsoft Excel Expert training and certification.
- Technical webcasts on current industry topics.
- Digital subscription to the Wall Street Journal.
- Enriching Leadership Development Calls with distinguished outside guest speakers.



<sup>1</sup>Dependent upon level and market and subject to increase for exceeding billable hours in accordance with Production Incentive Compensation Plan; <sup>2</sup>Vacation days may be cashed out; <sup>3</sup>Please refer to travel incentive policy for additional information; <sup>4</sup>Awards applicable for Professional Resource hires (modified awards available for other hires); <sup>5</sup>Within a 12 month period, must be employed at time of travel; <sup>6</sup>Cumulative throughout career at Siegfried; <sup>7</sup>Prorated amount based on start date

*The above are illustrative examples of earning that is possible under our current incentive programs and are not intended to be an exhaustive summary of how our incentive programs apply to all Siegfried employees. Many of these programs are earned on an annual basis. In general an employee must still be employed by Siegfried at the time of each payment. The implementation of, parameters for, calculation of, timing of payment of, eligibility for, and any judgments associated with any incentive compensation programs or plans shall be determined at the sole discretion of the Chief Executive Officer of Siegfried. Incentives programs may change or cease at any time. Allowances described herein that involve reimbursement may require acceptable and applicable documentation.*