



Trish Beltran

Supervisor, ESG Advisory Services

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Summary of experience

Trish Beltran is a Supervisor in RSM's ESG Advisory practice, with a background in assurance, technology integration, and business transformation. Trish manages the day-to-day operations of the practice, including client service delivery, methodology development, strategic projects, research, and thought-leadership. Her past experience working as a technology consultant at The National Aeronautics and Space Administration (NASA) and a large West Coast gas company – with a focus on leveraging technical solutions – has provided her with expertise in business process improvement, specifically focused on financial and non-financial data processing.

Trish leads RSM's ESG technology partnerships, assessing the various capabilities of platforms and understanding the strengths each brings to provide the best technology that will enhance the overall integration of ESG amongst the needs of RSM's clients. Trish has experience in facilitating software selection assessments, including business requirement gathering, vendor short listing, vendor comparison, demonstrations, and evaluations. In addition, Trish has mobilized and executed Project Management Office (PMO) functions for projects that range from two months to three years with multiple workstreams and cross functional teams to ensure successful testing and implementation. Additionally, Trish is RSM's Culture Diversity Inclusion Generation National Brand and Strategy Leader, promoting ESG throughout RSM.

Previously, Trish was part of RSM's assurance practice and specialized in both the Commercial and Financial Services industries, including banking, private equity, and real estate, where she performed substantive tests of internal controls to identify and resolve accounting or reporting issues, such as completeness and accuracy of data, while also assessing risks and recommending changes as needed to improve company controls. Trish's past roles in RSM has provided her with experience and expertise to identify and resolve reporting issues while also assessing risks and recommending changes as needed to improve the client's controls – a key aspect of ESG reporting strategy and framework development.

Within [RSM's ESG Advisory](#) practice, Trish leads projects across industries and provides guidance to our clients in maturing their ESG journey through developing project portfolio and roadmap of initiatives to achieve an optimized future state process, as well as enabling the continuous evolution of a Company's ESG maturity. Trish is also a thought leader and a key contributor in the development of RSM's proprietary *ESG Rapid Assessment Methodology*, *ESG Due Diligence Methodology*, *ESG Integration with Technology Methodology*, *ESG Report Content Organization Methodology* and overall go to market strategy.

Professional Affiliations & Credentials

- Scrum Master
- Lean Six Sigma – Green Belt
- Blockchain Fellow
- Workday Adaptive Planning
- Sage Intacct Implementation Specialist

Education

- Sustainable Business Strategy, Harvard Business School Online (2021)
- Bachelor of Science, Accounting, California State Polytechnic University, Pomona (2015)