



# Yeo & Yeo Foundation 2022 Annual Report

GIVING BACK TO THE COMMUNITIES  
IN WHICH WE LIVE, WORK & PLAY

LET'S THRIVE



YEOANDYEO.COM

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## ABOUT THE FOUNDATION

The Principals of Yeo & Yeo established the Yeo & Yeo Foundation in 2018 to provide a conduit for the firm to live out our strong beliefs and have a substantial impact on our communities. The Yeo & Yeo Foundation's goal is to serve as a channel to give back to the community through the provision of our time, talents and financial resources to charitable causes throughout Michigan.

## FOUNDATION MISSION

Fostering a culture of community service and volunteerism among all Yeo & Yeo employees firm-wide is at the core of the Foundation's objectives.

The Foundation strives to allow every member of our firm to give back to their community. Through the Foundation, we consciously support and build a culture at Yeo & Yeo that encourages volunteerism and community involvement.



# A Message from the Foundation's President

## TO OUR ASSOCIATES, CLIENTS & FRIENDS

At Yeo & Yeo, we're dedicated to helping our communities thrive. The Yeo & Yeo Foundation was created to fully embrace our dynamic culture of community service and volunteerism. It combines our passions and our purpose to serve others with our service mentality.

I am passionate about the Yeo & Yeo Foundation because it is a way for my donation dollars to be combined with others to make a larger impact.

I also love to see our employees become passionate about a nonprofit organization through volunteering, serving on committees or boards and providing financial support.

In 2022, we highlighted some of our people in our "Why We Give" campaign. Here are some of the reasons our professionals give back:

- Helping provide a safe place for kids to play and learn
- Supporting those who serve our country
- Supporting those struggling with hunger
- Showing appreciation for the arts
- Improving literacy in our communities

... and many more

It was truly a great year of giving for Yeo & Yeo and the Foundation. Collectively, we donated more than \$24,000 to the American Cancer Society (ACS) through the Yeo Young Professionals firm-wide service project. As a firm, we gave over \$130,000 to 56 organizations throughout Michigan.

It is an honor to serve as the Foundation President, and I look forward to the positive impact the Foundation will continue to have on our people and our communities.



Alex Wilson, CPA  
Yeo & Yeo Foundation  
Board President  
Senior Manager, Alma



# About the Foundation

## OUR WHY: THE HISTORY & VALUES THIS FIRM WAS BUILT UPON

More than 95 years ago, a father and son joined in an accounting partnership in Saginaw, Michigan, that would become the cornerstone of a public accounting practice. James J. Yeo and his son, W.L. Yeo, were later joined by James' grandson, Lloyd Yeo.

The three generations of the Yeo family believed it was vital to give back to the communities in which we live, work and play. Today, we are proud to continue their legacy through the Yeo & Yeo Foundation.

At Yeo & Yeo, we believe that we are only as strong as the communities we serve. Through the Foundation, we uplift our communities' organizations and people, leading to a happier, healthier, stronger Michigan.

## HOW WE GIVE

The Foundation supports and serves organizations that our associates across all Yeo & Yeo companies are personally involved in or passionate about. Therefore, all donation requests are sponsored by Yeo & Yeo employees. When reviewing

donation requests, the Grants Committee and the Foundation Board consider factors such as the mission and purpose of the requesting organization, the intended use of funds and the potential impact of the Foundation's support. Each year, the approved donations reflect the vast number of organizations that our Yeo & Yeo associates are personally involved with.



# Foundation Leadership Group

## THANK YOU TO OUR 2022 FOUNDATION BOARD OF DIRECTORS

The Foundation is managed and administered by an elected Board of Directors. The Board is charged with fulfilling the mission of cultivating a culture at Yeo & Yeo that supports and encourages volunteerism and community involvement.

Board membership is open to all full-time Yeo & Yeo employees (or retired associates) who have been employed by the firm for at least three years. The board reviews employee-sponsored donation requests quarterly and allocates financial resources to qualifying organizations.



**Rebecca Millsap**  
Managing Principal  
President



**Alex Wilson**  
Senior Manager  
Vice President/Fundraising  
Chair



**Brian Dixon**  
Managing Principal  
Treasurer



**Kyle Richardson**  
Manager Accountant  
Young Professionals/Service  
Chair



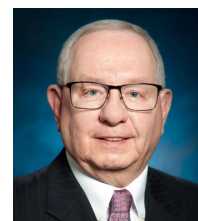
**Kimberlee Dahl**  
Marketing Director  
Communications Chair



**Jordan Hale**  
Manager Accountant  
Grants/Giving Chair



**Marisa Ahrens**  
Principal  
Secretary



**Michael Tribble**  
Partner Emeritus  
Founding Member



# THANK YOU TO OUR 2022 GRANT COMMITTEE OFFICE REPS

Each Yeo & Yeo office/company has a grant committee representative who receives donation requests from employees in their respective office. These representatives help facilitate their office's established review and approval process and submit the employee-sponsored donation requests to the Foundation Board for final approval.

*Many thanks to our office committee representatives for their passion in supporting the Yeo & Yeo Foundation and their communities!*



Alma – Meg Warner  
Senior Accountant



Ann Arbor – James Edwards  
Senior Manager



Flint – Kellen Riker  
Senior Accountant



Kalamazoo – Chelsea Meyer  
Manager Accountant



Lansing – Amy Jaehnig  
Administrative Assistant



Midland – Jim Bellor  
Manager Accountant



Saginaw – Amy Dittenber  
Administrative Assistant



YYTECH – Linda Bender  
Operations & Administration Supervisor



YIMBC – Denise Garrett  
Billing Manager



# The Numbers Behind Our Impact

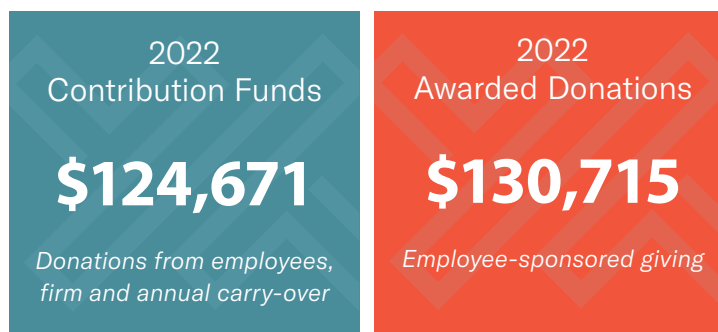
## 2022 FINANCIALS

In the Foundation's second operational year, we gave back more than \$130,000 to 56 organizations across Michigan. Every dollar raised and donated came from the contributions of our people and the firm!

Of course, financial support is only one part of the mission of the Yeo & Yeo Foundation.

Community service and volunteerism is our core value. We are proud to have helped so many organizations in 2022.

*Thank you to our employees and leaders for supporting the Foundation and our communities.*



<b>Income Statement</b>	
<b>12 months ending December 31, 2022</b>	
<b>Income</b>	
Contributions	\$124,671
Net Investment Income	<u>(11,762)</u>
<b>Total Income</b>	<b><u>\$112,909</u></b>
<b>Expenses</b>	
Donations Provided	\$130,715
Other Expenses	<u>152</u>
<b>Total Expenses</b>	<b><u>\$130,867</u></b>
<b>Net income</b>	<b><u>\$(17,958)</u></b>

<i>Annual Giving</i>	<b>2022</b>	<b>2021</b>	<b>2020</b>
Annual Contributions	\$124,671	\$121,705	\$120,021
Awarded Donations	\$130,715	\$108,873	\$105,270
Organizations Served	56	62	58



# Organizations Served

## GIVING BACK

In 2022, the Foundation contributed more than \$130,000 to 56 organizations throughout the Michigan communities in which we live, work and play. All organizations were employee-sponsored and nominated out of passion from serving on boards and committees, volunteerism or other involvement. As a whole, Yeo & Yeo professionals contribute their time, talent and financial support to more than 200 organizations throughout our communities.

## ALMA

- Alma Public Schools
- Central Michigan Youth for Christ
- Children's Discovery Academy
- Gratiot County Child Advocacy
- Love Inc. of Gratiot County

## ANN ARBOR

- Aid in Milan
- Blessings in a Backpack - Wyandotte
- EMU Foundation
- Fish & Loaves Community Food Pantry
- Gamers Outreach Foundation
- Shelter to Home

## AUBURN HILLS

- American Humane
- American Red Cross
- Bottomless Toy Chest
- Grosse Point Animal Adoption Society





## FLINT

- Adopt-a-Pet
- Angel Names Association
- Friends of the Alley
- Humane Society of Genesee County
- Hurley Foundation - NICU Department
- Rebuilding Together Southeast MI

## KALAMAZOO

- Barry County 4H Advisory Council
- First Tee West Michigan
- Mattawan Lions Foundation
- Portage Community Center

## LANSING

- Communities in Schools Michigan
- Give-A-Kid-Projects
- Holt Food Bank
- Potter Park Zoo Adopt-a-Pet
- South Lansing Ministries

## MIDLAND

- Home to Stay Housing Assistance Center
- Midland Community Orchestra
- Midland Explorers

## SAGINAW

- Barb Smith Suicide & Resource Network
- Big Brothers Big Sisters of the Great Lakes Bay Region
- Boys & Girls Club of the Great Lakes Bay Region
- CAN Council Arenac-Bay-Huron-Saginaw
- Humane Society of Bay County
- Major Chords for Minors
- Midland High School Music Parents Association
- Mid-Michigan Children's Museum
- READ Association of Saginaw County
- Rescue Ministries of Mid-Michigan
- Saginaw County Veterans Memorial Plaza
- Undercover Angels Animal Rescue of Saginaw
- Youth Development Corporation, USA



## YEO & YEO TECHNOLOGY

- READ Association of Saginaw County
- United Way of Saginaw County

## YEO & YEO MEDICAL BILLING & CONSULTING

- Aaron's Gifts From Home
- All About Animals Rescue
- Amazing Grace Animal Rescue
- CAN Council
- Jayden Lamb Memorial Foundation
- Saginaw Bay Symphony Orchestra
- Sleep in Heavenly Peace

## A MESSAGE TO OUR PEOPLE

Thank you all for supporting our Foundation. Yeo & Yeo was able to help each of the organizations listed here because of your time, talent, and financial support.

Looking ahead to 2023, we hope to help even more!

*Do you sit on a committee or board?*

*Do you volunteer or donate?*

*Are you passionate about an organization's mission?*

Start thinking now about how you want to give back in 2023, and let's get giving!





# Yeo Young Professionals 2022 Service Project

## American Cancer Society Making Strides Against Breast Cancer

This year, to foster a culture of community service among all Yeo & Yeo employees, the firm’s Yeo Young Professionals (YYP) group sponsored a firm-wide service project to benefit the American Cancer Society (ACS) Making Strides.

The Making Strides movement raises life-saving funds for breast cancer patients, survivors, thrivers, and caregivers. To show our support of the movement, all Yeo & Yeo employees were encouraged to bring their friends and families to Making Strides walks across Michigan. Yeo & Yeo teams were at six walks – Making Strides of the Great Lakes Bay, Ann Arbor, Lansing, Oakland and Macomb Counties, and West Michigan.

We also hosted fundraising events throughout our offices leading up to the walks:

**GUESS THE GUMBALLS**

**CUBE DECORATING**

**PIED FOR A CAUSE**

**T-SHIRT DESIGN CONTEST**

As a firm, we showed a remarkable culture of giving back and making an impact! We surpassed our fundraising goal, proudly donating over \$24,000 to ACS.



# “We make a living by what we get, we make a life by what we give.”

– Winston Churchill





# YEO & YEO

FOUNDATION

## YEO & YEO FOUNDATION 2023 BOARD OF DIRECTORS

Alex Wilson, President  
Brian Dixon, Vice President / Fundraising Chair  
Jordan Hale, Treasurer  
Marisa Ahrens, Secretary  
Jeff McCulloch, Grants & Giving Chair  
Kimberlee Dahl, Communications Chair  
Meg Warner, Young Professionals / Service Chair

## GRANTS & GIVING / FUNDRAISING 2023 OFFICE COMMITTEE REPRESENTATIVES

Alma – Meg Warner  
Ann Arbor – James Edwards  
Auburn Hills – Taylor Keating  
Flint – Kellen Riker  
Kalamazoo – Chelsea Meyer  
Lansing – Amy Jaehnig  
Midland – Jim Bellor  
Saginaw – Amy Dittenber  
YYTECH – Linda Bender  
YYMBC – Denise Garrett

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