

A photograph of four volunteers in light blue shirts working in a warehouse or donation center. They are smiling and packing cardboard boxes. One man is handing a yellow object to a woman, who is also smiling. Another woman is using a yellow tape dispenser on a box. A third woman is in the background. There are several cardboard boxes, some labeled 'DONATION', and various items like water bottles and clothes. A green plant is in the foreground.

# Yeo & Yeo Foundation 2020 Annual Report

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



## 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.

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*Note: Some photos were taken pre-COVID. Yeo & Yeo and its employees follow all CDC guidelines and mask mandates.*



# A Message from the Foundation's Immediate Past President

## To Our Associates, Clients and Friends

I am pleased to present to our associates, clients and friends, the Yeo & Yeo Foundation 2020 Annual Report.

Our culture of giving was cultivated many years ago by the Principals of this firm. Through the Yeo & Yeo Foundation, we continue their community support mission and encourage all associates to give back to their communities.

This past year proves the importance and value of giving back, as many individuals and

organizations were affected by the COVID-19 pandemic. We are proud to support our communities during these challenging times.

2020 marked the first fully operational year of financial giving for the Foundation, which donated funds to 58 organizations across Michigan. In 2021, we will continue to make the Foundation a valued part of everyone's experience with Yeo & Yeo and we look forward to increasing our charitable impact and serving even more organizations that our associates are passionate about.

I thank my fellow board members, our office committee representatives and our professionals for so generously supporting the Foundation. It has been an honor to serve as the Foundation President in its inaugural years. I look forward to positive the impact the Foundation will have on our communities for years to come.

**Mike Tribble, CPA**  
*Yeo & Yeo Foundation*  
*Immediate Past President & Founding Member*



"Life is a boomerang. What you give, you get."

– Dale Carnegie



## 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.



"Each of us can make a difference, together we can make a change."

— Barbara Mikulski



# Leadership Group

## 2020 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.



Michael Tribble  
Partner Emeritus  
President/Treasurer  
*Founding Member*



David Schaeffer  
Partner Emeritus  
Vice President/Fundraising Chair  
*Founding Member*



Rebecca Millsap  
Managing Principal  
Secretary & Grants/Giving Chair



Alex Wilson  
Manager Accountant  
Service Chair



Kimberlee Dahl  
Marketing Director  
Communications Chair



Kati Krueger  
YYMBC President  
Affiliate Representative



Chelsea Meyer  
Manager Accountant  
At-large Representative

## 2020 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 offices' 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 – Alex Wilson  
Manager Accountant



Ann Arbor – Ashley Rabie  
Manager Accountant



Auburn Hills – Kyle Richardson  
Senior Accountant



Flint – Kellen Riker  
Staff Accountant



Kalamazoo – Chelsea Meyer  
Manager Accountant



Lansing – Amy Jaehng  
Administrative Assistant



Midland – Sheila Murphy  
Administrative Assistant



Saginaw – Jen Gibas  
Administrative Assistant



YYCC – Samantha Spindler  
Sales Support Specialist



YYMBC – Denise Garrett  
Training & Development  
Coordinator





# The Numbers Behind Our Impact

## 2020 Financials

In the Foundation's first fully operational year, we gave back more than \$105,000 to 58 organizations across Michigan. Every dollar raised and donated came from the contributions of our people and the firm! We more than doubled our first-year goal for awarded donations.

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

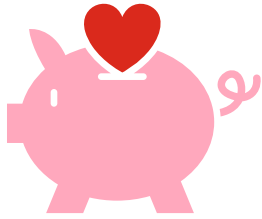
service and volunteerism is our core value. The COVID-19 pandemic made large-scale volunteer efforts challenging. While we were unable to hold our annual Yeo Young Professionals (YYP) firm-wide service event, our people remained committed to volunteering individually and in small groups.

We are proud to have helped so many organizations in 2020.

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

**\$120,021**  
Contributions from Yeo & Yeo employees, leaders and firm revenue

**58**  
Organizations received a donation from the Yeo & Yeo Foundation



**\$105,270**  
Total awarded donations

<b>Income Statement</b>	
12 Months Ending December 31, 2020	
<b>Income</b>	
Contributions	120,021.00
Net Investment Income	8,561.84
<b>Total Income</b>	<b>\$ 128,582.84</b>
<b>Expenses</b>	
Donations Provided	105,270.00
Other Expenses	721.75
<b>Total Expenses</b>	<b>\$ 105,991.75</b>
<b>Net</b>	<b>\$ 22,591.09</b>



# Organizations Served

## Giving Back

In 2020, the Foundation contributed more than \$105,000 to the following 58 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.

## Alma

- Child Advocacy
- Children’s Discovery Academy
- Special Olympics
- The Care Store
- United Way of Gratiot County

## Ann Arbor

- Ann Arbor Track Club Youth Athletics Division
- Community Choice Foundation
- LACASA Center
- The Clean Love Project
- We the People Opportunity Farm
- Ypsilanti Community Schools Foundation

## Auburn Hills

- ACS - Making Strides Again Breast Cancer
- ElderHeart Inc.
- Food Bank of Eastern Michigan
- Gleaners Community Food Bank of Southeastern Michigan



“Giving is not just about making a donation. It is about making a difference.”

– Cathy Kalvin



## Flint

- All About Animals Rescue
- Food Bank of Eastern Michigan
- Humane Society of Midland County
- Midland Area Community Foundation
- Old Newsboys of Flint
- Voices for Children
- Whaley Children's Center
- YMCA
- Youth Quest

## Kalamazoo

- Barry County 4-H Program Small Animal Sale Committee
- Hospital Hospitality House of Southwest Michigan
- InterAct of Michigan
- Kalamazoo Animal Rescue
- Kalamazoo Valley Habitat for Humanity
- Westwood Neighborhood Food Pantry

## Lansing

- Give-A-Kids Projects

## Midland

- ACS - Making Strides Again Breast Cancer Saginaw/Bay
- Four Lakes Task Force
- Humane Society of Midland County
- Midland Area Community Foundation
- The Leukemia and Lymphoma Society

## Saginaw

- ACS - Making Strides Again Breast Cancer Saginaw/Bay
- Beacon of Hope
- CAN Council



- East Side Soup Kitchen
- Four Lakes Task Force
- Great Lakes Bay Health Centers
- Humane Society of Bay County
- Mid-Michigan Children's Museum
- Midland Area Community Foundation
- Partnership Center
- Saginaw County Veterans Memorial Plaza
- Salvation Army of Bay County - Coats/Toys
- Salvation Army of Bay County - Meals
- Toys for Tots
- Underground Railroad
- Valley Lutheran High School - Soccer Program

## Yeo & Yeo Computer Consulting

- City Rescue Mission of Saginaw
- READ Association of Saginaw County
- Saginaw Valley United Women of Worth

## Yeo & Yeo Medical Billing & Consulting

- Aaron's Gifts From Home
- Amazing Grace Animal Rescue
- Emmaus House of Saginaw
- Michigan Walleyes for Warriors
- Midland Area Community Foundation
- Thunder in the Valley Games

## Reflecting on 2020

2020 was undoubtedly a challenging year, with the COVID pandemic turning many of our worlds upside down. In response to these challenges, our associates and communities banded together to support one another. Many provided selfless care and unwavering help to those in need, from donating food and hand-sewing PPE to aiding in the recovery process after floods devastated Midland and Sanford. Our community members and associates have done extraordinary things this year to meet new needs.

We are incredibly proud to be a part of our Michigan communities. Giving our time and resources to create positive change is the cornerstone of everything the Foundation stands for.



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

– Winston Churchill



## YEO & YEO FOUNDATION 2021 BOARD OF DIRECTORS

Rebecca Millsap, President  
Alex Wilson, Vice President / Fundraising Chair  
Chelsea Meyer, Treasurer  
Kati Krueger, Secretary / Grants & Giving Chair  
Kimberlee Dahl, Communications Chair  
Mitch Kennedy, Service Chair  
Brian Dixon, At-large Member

## 2021 GRANTS & GIVING / FUNDRAISING OFFICE COMMITTEE REPRESENTATIVES

Alma – Alex Wilson  
Ann Arbor – Ashley Rabie  
Auburn Hills – Kyle Richardson  
Flint – Kellen Riker  
Kalamazoo – Chelsea Meyer  
Lansing – Amy Jaehnig  
Midland – Jim Bellor  
Saginaw – Amy Dittenber  
YYCC – Samantha Spindler  
YYMBC – Denise Garrett

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