



# Yeo & Yeo Foundation 2021 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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# A Message from the Foundation's President

## To Our Associates, Clients and Friends

*"Why do we give back?"*

Some of the calls for support we receive are specific to dates such as MLK Day or events like natural disasters.

But we could all stand for the possibility of serving others routinely and with joy outside the confines of fundraisers, events, or immediate needs.

At Yeo & Yeo, we challenge our people to give

back *purposefully* to organizations they are passionate about because we believe that we are only as strong as the communities we serve.

2021 marked the second fully operational year of financial giving for the Foundation, which donated funds to 62 organizations across Michigan.

In 2022, we look forward to our continued involvement in causes large and small throughout our communities.

I thank my fellow board members, our office committee representatives, and our professionals for generously supporting the Foundation.

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.

**Rebecca Millsap, CPA**  
*Yeo & Yeo Foundation*  
*Foundation President & Managing Principal - Flint*



Flags at Veterans' Graves



# 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.



Salvation Army of Bay City Car Cruise



# Leadership Group

## Thank you to our 2021 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  
Manager Accountant  
Vice President/Fundraising Chair



Brian Dixon  
Principal  
At-Large Representative



Kyle Richardson  
Senior Accountant  
Young Professionals/Service  
Chair



Kimberlee Dahl  
Marketing Director  
Communications Chair



Kati Krueger  
YYMBC President  
Grants/Giving Chair



Chelsea Meyer  
Manager Accountant  
Treasurer



Michael Tribble  
Partner Emeritus  
Non-Voting Founding Member

## Thank you to our 2021 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 – 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 Jaehnig  
Administrative Assistant



Midland – Jim Bellor  
Manager Accountant



Saginaw – Amy Dittenber  
Administrative Assistant



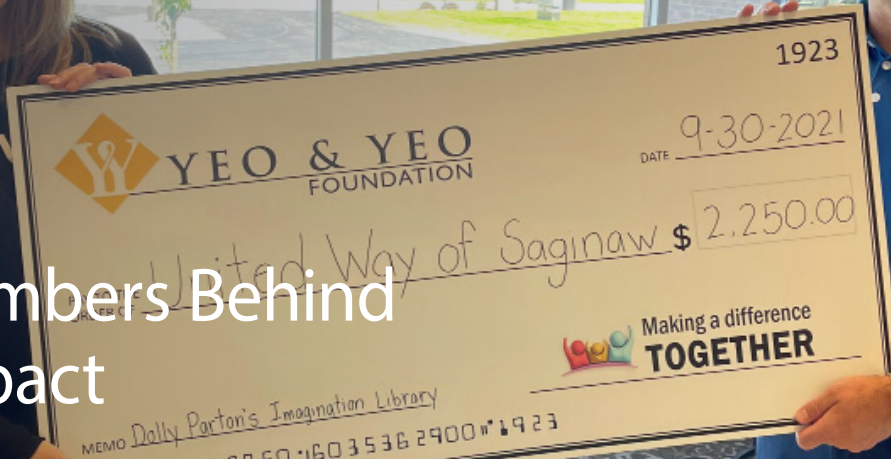
YYCC – Kimberly St John  
Operations Manager



YYMBC – Denise Garrett  
Training & Development  
Coordinator



# The Numbers Behind Our Impact



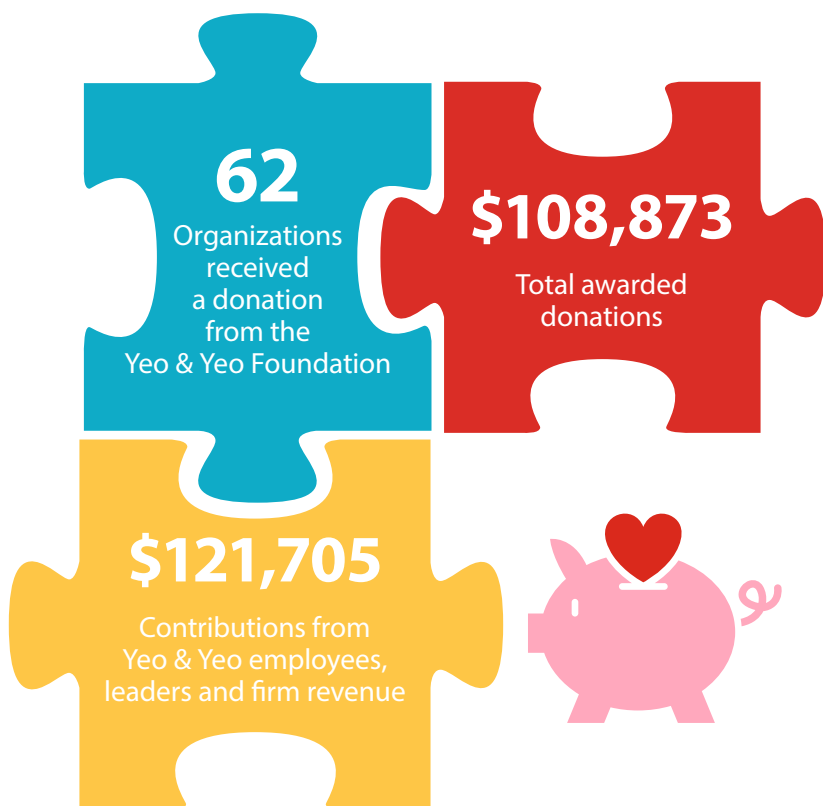
## 2021 Financials

In the Foundation's second operational year, we gave back more than \$108,000 to 62 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. While

the COVID-19 pandemic continued to make large-scale volunteer efforts challenging, our people remained committed to volunteering individually and in small groups. We are proud to have helped so many organizations in 2021.

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



| <b>Income Statement</b>                   |                |
|---|----------------|
| <b>12 Months Ending December 31, 2021</b> |                |
| <b>Income</b>                             |                |
| Contributions                             | 121,705        |
| Net Investment Income                     | 8,500          |
| <b>Total Income</b>                       | <b>130,205</b> |
| <b>Expenses</b>                           |                |
| Donations Provided                        | 108,873        |
| Other Expenses                            | 393            |
| <b>Total Expenses</b>                     | <b>109,266</b> |
| <b>Net Income</b>                         | <b>20,939</b>  |



## Organizations Served

### Giving Back

In 2021, the Foundation contributed more than \$108,000 to 62 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

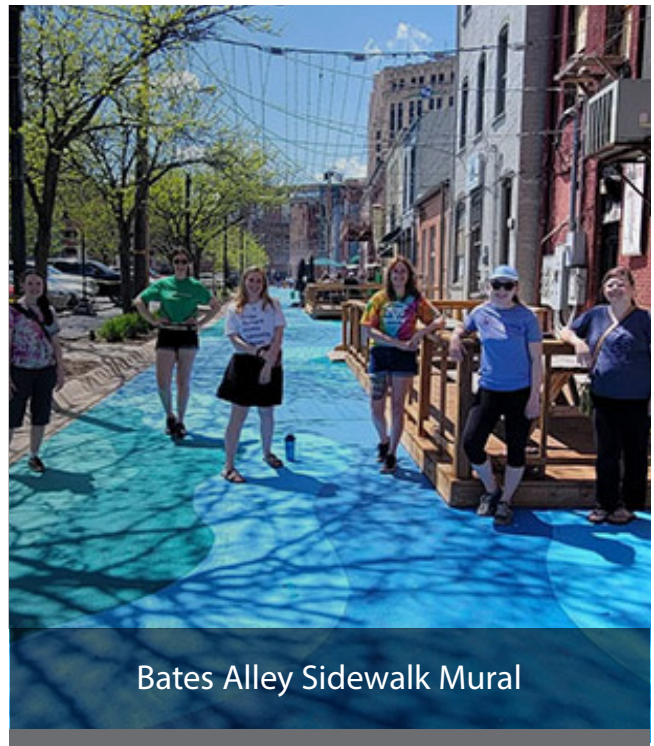
- Children's Discovery Academy
- Gratiot-Isabella RESD
- RISE Advocacy, Inc.
- United Way of Gratiot & Isabella Counties

### Ann Arbor

- Aid in Milan
- Christy's Legacy of Hope
- St. Louis Center
- Starfish Family Services

### Auburn Hills

- Angels' Place
- Community Foundation of Greater Rochester
- Ele's Place
- First Step
- Humble Design
- Scripps Howard Foundation



Bates Alley Sidewalk Mural



## Flint

- Detroit Zoological Society
- Girl Scouts of Southeastern Michigan
- International Academy of Flint
- Old Newsboys of Flint
- Quality Living Systems
- Streethearts Animal Rescue
- Sylvester Broome Empowerment Village
- United Way of St. Charles Parish
- Whaley Children's Center
- YMCA of Flint - Safe Places Program

## Kalamazoo

- Bethany Christian Services
- Binder Park Zoo
- Gryphon Place
- Haven of Rest
- InterAct of Michigan
- Kalamazoo Valley Habitat for Humanity
- Mattawan Lions Club Foundation
- Rootead - Red Birth Green Program
- Vicksburg High School Boosters

## Lansing

- Capital Area Humane Society
- Ele's Place
- Give-A-Kid Projects
- Potter Park Zoo

## Midland

- Haiti Foundation Against Poverty
- Midland Community Orchestra

## Saginaw

- Angels Among Us
- Arrowwood Elementary School
- Beacon of Hope Pregnancy Care Center



- Big Brothers Big Sisters of the Great Lakes Bay Region
- CAN Council
- Eastside Soup Kitchen
- Humane Society of Bay County
- I Support the 1% Veterans Food Pantry
- Major Chords for Minors
- Partnership Center
- Salvation Army of Bay County
- Self Love Beauty
- United Way
- Valley Lutheran High School
- Women of Colors

## Yeo & Yeo Computer Consulting

- Caregiving Network, Inc.
- Heart of Saginaw
- Tri-City Undercover Angels Animal Rescue
- United Way of Saginaw County

## Yeo & Yeo Medical Billing & Consulting

- Aaron's Gifts From Home
- CAN Council
- Jayden Lamb Foundation
- Mustard Seed Shelter
- Project Underdog
- Saginaw Bay Symphony Orchestra

## 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.

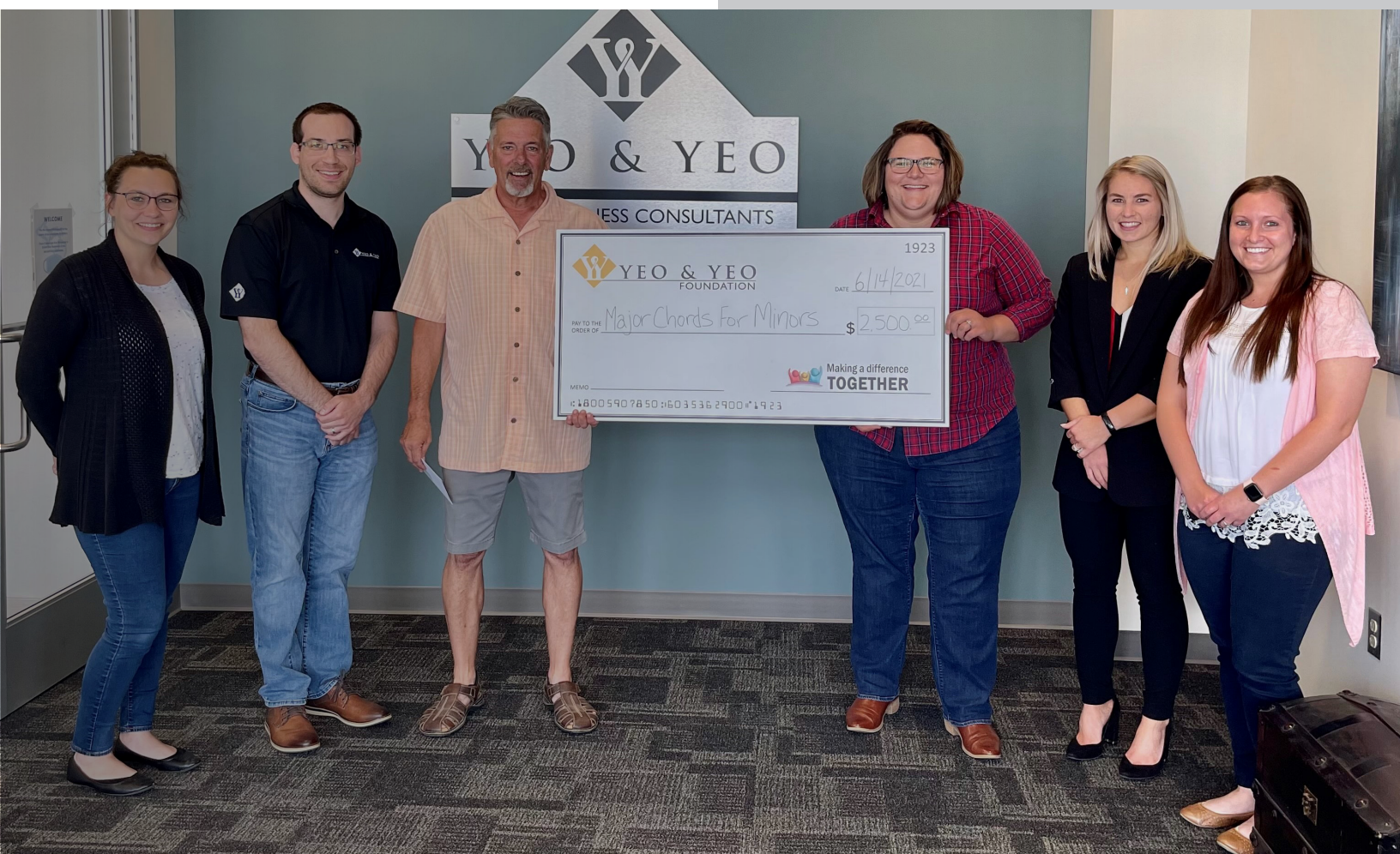
Looking ahead to 2022, we hope to help even more!

*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 next year, and let's get giving!



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

– Winston Churchill



**YEO & YEO FOUNDATION**  
**2022 BOARD OF DIRECTORS**

Rebecca Millsap, President  
Alex Wilson, Vice President / Fundraising Chair  
Brian Dixon, Treasurer  
Marisa Ahrens, Secretary  
Jordan Hale, Grants & Giving Chair  
Kimberlee Dahl, Communications Chair  
Kyle Richardson, Young Professionals / Service Chair

**GRANTS & GIVING / FUNDRAISING**  
**2022 OFFICE COMMITTEE REPRESENTATIVES**

Alma – Meg Warner  
Ann Arbor – Ashley Rabie  
Auburn Hills – Karen Kosto  
Flint – Kellen Riker  
Kalamazoo – Chelsea Meyer  
Lansing – Amy Jaehnig  
Midland – Jim Bellor  
Saginaw – Amy Dittenber  
YYCC – Julian Braem  
YYMBC – Denise Garrett

**Yeo & Yeo Foundation**

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