



Yeo & Yeo Foundation 2023 Annual Report

WE ARE COMMUNITY BUILDERS.

HELPING OUR MICHIGAN COMMUNITIES THRIVE.

LET'S THRIVE



YEOANDYEO.COM

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A CENTURY OF SERVING

The firm's culture of giving back started with our founders, the Yeo family, 100 years ago. They 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. The Foundation gives each employee an opportunity to support organizations through volunteerism and financial gifts. 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.

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

A volunteer reads to school children. A patient receives steady medication. A mother and child eat a hot meal and lay in a warm bed. An animal receives life-saving surgery. A first-time homebuyer moves into his/her own home.

Each of these scenes is possible because of the nonprofit sector and the work performed by these organizations. Nonprofits are all around us and improving the world through advances in education, healthcare, arts and culture, economic development, animal welfare, human services, and other vital areas. They remind us that more is possible and that together we can make the world a better place, one person and one community at a time.

Giving back is a core value woven throughout our company culture for 100 years. Today, we provide more than 425 nonprofit clients with our accounting, advisory, audit and technology expertise. We give back with our time and talents by serving on committees and boards and volunteering. And we help well over 50 organizations annually with donations through the Foundation and personally. I believe our firm's founders would be proud. I know I am.

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. 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

Principal &
Yeo & Yeo Foundation
Board President



2023 Foundation Leadership Group

THANK YOU TO OUR 2023 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-submitted donation requests quarterly and allocates financial resources to qualifying organizations.



Alex Wilson
Principal
President



Brian Dixon
Managing Principal
Vice President/Fundraising
Chair



Jordan Hale
Manager
Treasurer



Meg Warner
Senior Accountant
Young Professionals/Service
Chair



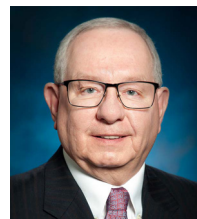
Kimberlee Dahl
Marketing Director
Communications Chair



Jeff McCulloch
YYTECH President
Grants/Giving Chair



Marisa Ahrens
Principal
Secretary



Michael Tribble
Partner Emeritus
Founding Member



THANK YOU TO OUR 2023 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-directed 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
Manager



Kalamazoo – Chelsea Meyer
Senior Manager



Lansing – Amy Jaehnig
Administrative Assistant



Midland – Jim Bellor
Senior Manager



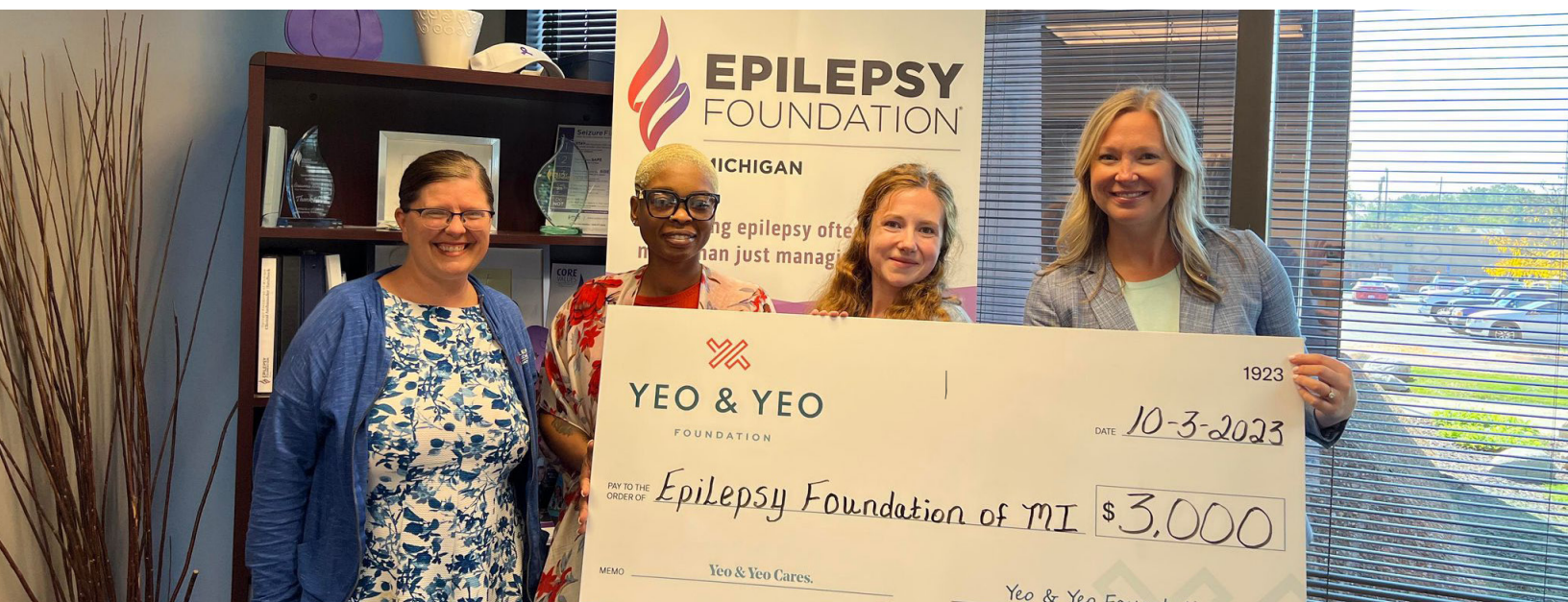
Saginaw – Amy Dittenber
Administrative Assistant



YYTECH – Linda Bender
Operations &
Administration Supervisor



YYMBC – Denise Garrett
Billing Manager



The Numbers Behind Our Impact

2023 FINANCIALS

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 submitted 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.

In the Foundation's fourth operational year, we gave back more than \$140,000 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 one of our core values. We are proud to have helped so many organizations in 2023.

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

2023 Donation Funds

\$113,968

Donations from our employees, principals and firm revenue allocation

2023 Awarded Contributions

\$140,485

Employee-directed giving

2023 Receiving Nonprofit Organizations

62

Throughout Michigan and beyond

Income Statement

12 months ending December 31, 2023

Income

Contributions	\$113,968
Net Investment Income	\$ 8,973
Total Income	\$122,941

Expenses

Donations Awarded	\$140,485
Other Expenses	\$ 34
Total Expenses	\$140,519

Annual Giving	2023	2022	2021	2020
Annual Contributions	\$113,968	\$124,671	\$121,705	\$120,021
Awarded Donations	\$140,485	\$130,715	\$108,873	\$105,270
Organizations Served	62	56	62	58



Organizations Proudly Served

In 2023, the Foundation contributed more than \$140,000 to 62 organizations throughout the Michigan communities in which we live, work and play. All organizations were employee-submitted 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 annually.

ALMA

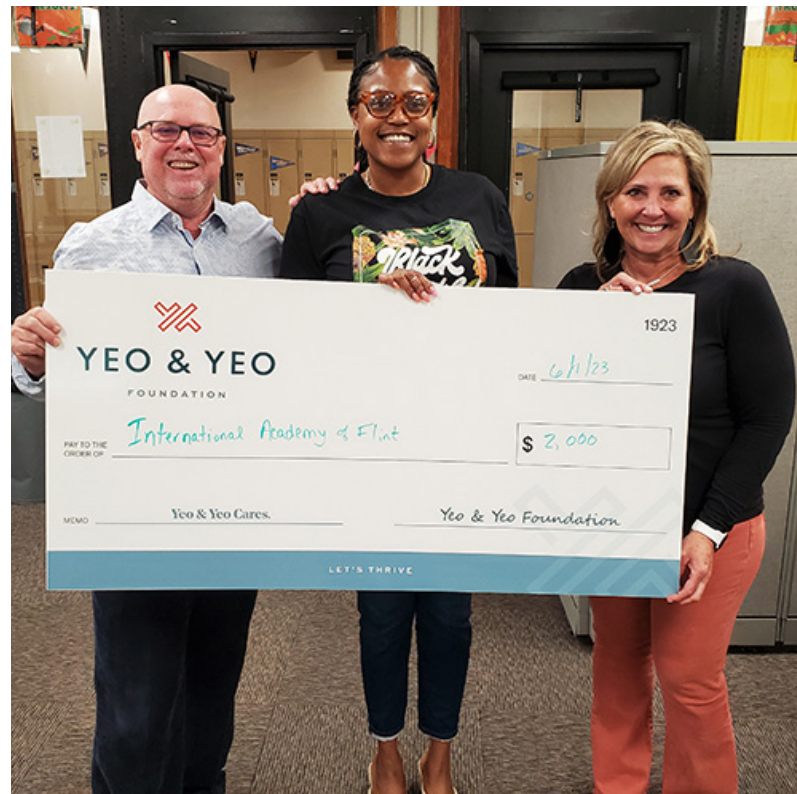
- Kali's Cure for Paralysis Foundation
- Mt. Pleasant Figure Skating Club, Inc.
- The Care Store
- United Way of Gratiot & Isabella Counties

ANN ARBOR

- Addison Public School PTO
- ALS of Michigan
- Beta Alpha Psi, Epsilon Omega Chapter
- EMU Foundation
- Fish & Loaves Community Food Pantry
- Gamers Outreach Foundation
- Veterans of the Game, Inc.

AUBURN HILLS

- Clinton River Watershed Council
- Epilepsy Foundation of Michigan
- Humble Design



FLINT

- Clara's Hope
- Flushing Youth Tackle Football Program, Inc.
- Girl Scouts of Southeastern Michigan
- International Academy of Flint
- Quality Living Systems

KALAMAZOO

- First Tee – West Michigan
- Hospital Hospitality House
- Kalamazoo Animal Rescue
- Kalamazoo Valley Habitat for Humanity
- South Michigan Food Bank
- Webster Memorial Library
- Westwood Neighborhood Food Pantry
- YWCA of Kalamazoo

LANSING

- Delta Township District Library
- Haven House
- Mitten Misfits Farm Sanctuary
- Potter Park Zoo
- The Friends of the Walker Memorial Library
- The Well Education Center
- Woldumar Nature Center

MIDLAND

- Home To Stay of Midland
- Midland Community Orchestra
- Midland Explorers
- Midland's Open Door

SAGINAW

- Bay Community Tennis Association
- CAN Council
- Great Lakes Bay Foundation / Great Lakes Bay Region Mental Health Partnership
- Great Lakes Bay Health Centers
- Major Chords for Minors
- Partner Shift Network
- Saginaw Township Soccer Association
- Self Love Beauty
- Thomas Township Parks & Recreation
- Tuscola County Special Olympics
- United Way of Bay County
- Wellspring Lutheran Services
- Westdale Elementary PTO
- Women of Colors



YEO & YEO TECHNOLOGY

- CAN Council
- Covenant Healthcare - NICU
- READ Association of Saginaw County
- Tri-City Undercover Angels Animal Network
- United Way of Saginaw County

YEO & YEO MEDICAL BILLING & CONSULTING

- Aaron's Gifts From Home
- Amazing Grace Animal Rescue
- Japanese Cultural Center
- Project Underdog

A MESSAGE TO OUR PEOPLE

We are very fortunate to have so many individuals throughout the firm with passion for giving back. 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.

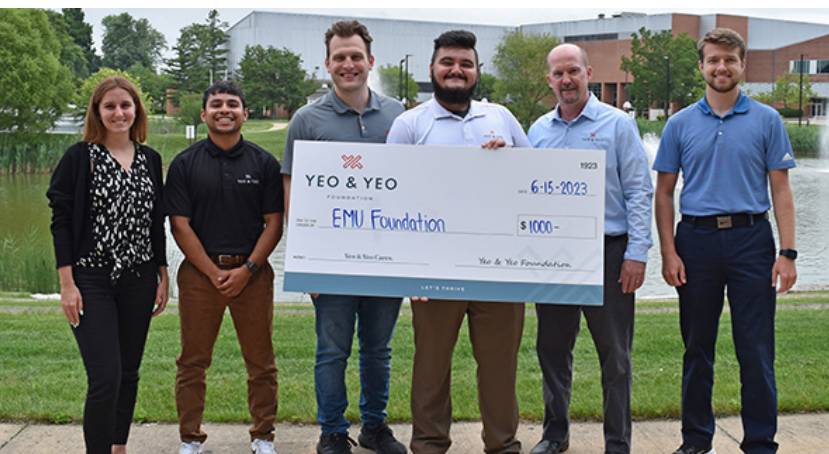
Looking ahead to 2024, we hope to help even more!

Do you sit on a committee or board?

Do you volunteer or donate?

Are you passionate about an organization's mission?

Think about how you want to give back in 2024, and let's get giving!





Yeo Young Professionals 2023 Service Project

SPECIAL OLYMPICS MICHIGAN

A portion of all Foundation donation funds support our Yeo Young Professionals in organizing a firm-wide service project. This year, the Yeo Young Professionals supported the Special Olympics. The mission of Special Olympics Michigan is to provide year-round sports training and athletic competition for children and adults with intellectual disabilities. Over 20,000 athletes participate in Special Olympics Michigan programs each year!

On Friday, June 2, 2023, more than 30 Yeo & Yeo volunteers attended the Michigan Special Olympics State Summer Games on Central Michigan University's campus. Volunteers helped with events such as track & field and bocce ball.

In addition to organizing this volunteer effort, the YYPs created fundraisers to benefit Special Olympics.

DUNKED FOR A CAUSE

TRIVIA COMPETITION

MARCH MADNESS

As a firm, we showed a remarkable culture of giving back and making an impact! More than \$12,000 was raised to benefit the Michigan Special Olympics – \$10,000 from the Yeo & Yeo Foundation and \$2,691 from Yeo & Yeo fundraisers.

ACS MAKING STRIDES WALKS

The Yeo Young Professionals also supported the American Cancer Society's Making Strides Against Breast Cancer walks in 2023. More than \$6,000 was donated through the Yeo & Yeo Foundation and raised by our employees throughout our offices. Staff also volunteered at the Great Lakes Bay Region walk in Saginaw on October 7.



Spotlight On Helping



CHRIS AILSTOCK
FIRST TEE - WEST MICHIGAN

Chris Ailstock, Senior Accountant in Kalamazoo, spends a couple of hours each week as a volunteer coach for

First Tee – West Michigan spring and summer golf camps. Through his passion for golf, Chris got involved with the organization last year. He just happened to be golfing while the kids were in session. He was curious, so he went over and asked about it, and he was inspired!

There was a little twist on this donation! Chris had to golf for it! On June 23, Chris participated in the **First Tee – West Michigan Golf Marathon** raising \$20 per hole played. In a full day of swinging clubs, **Chris golfed 108 holes raising \$2,542** that was donated through the Yeo & Yeo Foundation. The funds will help provide scholarships to qualifying kids so all have the opportunity to participate in the six-class sessions.



DENISE GARRETT
AARON'S GIFTS FROM HOME

Denise's husband is in the Reserves, and he served overseas in 2004. From that experience, she knows how much troops appreciate care packages and mail. Denise has volunteered for more than three years with Aaron's Gifts and has also hosted collections for items at the Saginaw office. The grant amount was \$1,250. The funds donated will go toward purchasing items – comic books, DVDs, snacks, and games – and shipping boxes for the troops.

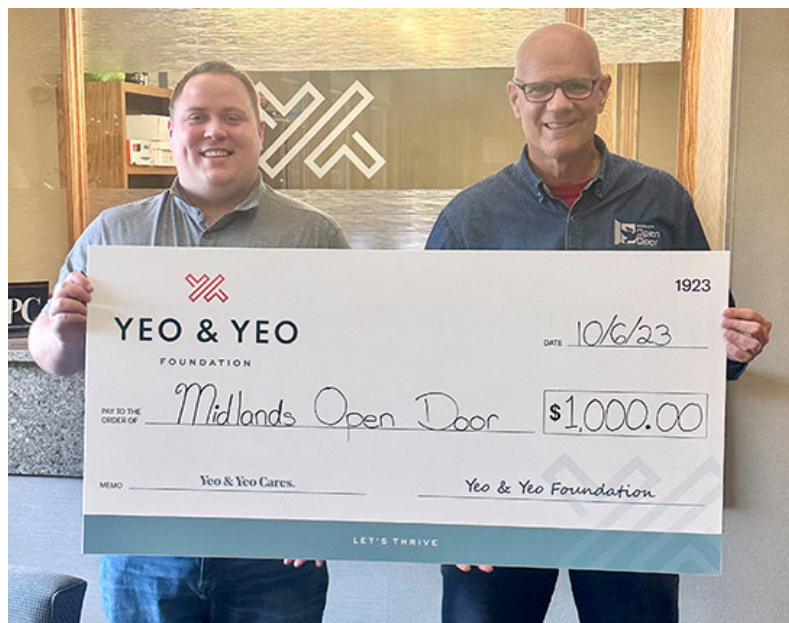


LINDA BENDER
COVENANT HEALTHCARE NICU

Cameron: Born 2 lb., 2 oz. at 26 weeks, spending 102 days in NICU. Now a thriving 6-year-old.

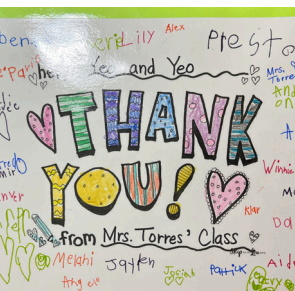
Becklyn: Born 1 lb., 6.9 oz. at 26 weeks, spending 105 days in NICU. Today, she is two-and-a-half and thriving!

These two bundles of joy are why Linda Bender is passionate about supporting Covenant HealthCare's NICU. Cameron and Becklyn are Linda's niece's babies, and the family was beyond grateful for the care and compassion the NICU staff provided these precious little ones. The donation provided supplies that help NICU babies thrive and that make a challenging time easier on the family. From new isolettes to baby swings, Covenant NICU is thankful for the donation of \$2,500 submitted by Linda and YYTECH staff!



“There is no better exercise for your heart than reaching down and helping lift someone up.”

– Bernard Meltzer





YEO & YEO

FOUNDATION

YEO & YEO FOUNDATION 2024 BOARD OF DIRECTORS

Alex Wilson, President
Brian Dixon, Vice President / Fundraising Chair
Jordan Hale, Treasurer
Meg Warner, Secretary
Jeff McCulloch, Grants & Giving Chair
Taylor Bartosiewicz, Communications Chair
Kellen Riker, Young Professionals / Service Chair

GRANTS & GIVING / FUNDRAISING 2024 OFFICE COMMITTEE REPRESENTATIVES

Alma – Emily Ball
Ann Arbor – James Edwards
Auburn Hills – Breanna-Faye Evans
Flint – Holly Blood
Kalamazoo – Chelsea Meyer
Lansing – Amy Jaehnig
Midland – Zoey Provenzano
Saginaw – Amy Dittenber
YYTECH – Linda Bender
YYMBC – Samantha Middleton

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