



# Helping You Build a Stronger Business



Yeo & Yeo is recognized among the Top 200 accounting and consulting firms in the country. Rely on us to help you overcome challenges and seize opportunities.

## Outstanding Business Solutions

Yeo & Yeo is a leading accounting, wealth management, technology, and medical billing firm with more than 200 employees in offices throughout Michigan. Our people are trusted advisors, our clients are friends, and our community is our foundation.

We offer our clients a complete resource, committed to providing outstanding business solutions and exceeding expectations in everything we do.

**Yeo & Yeo CPAs & Business Consultants**

**Yeo & Yeo Wealth Management**

**Yeo & Yeo Computer Consulting**

**Yeo & Yeo Medical Billing & Consulting**



## Driven by Your Success

Yeo & Yeo combines the capabilities and resources of an international firm with the type of personal business relationships only a local firm can offer. Our specialized industry and service groups deliver in-depth knowledge and experience relevant to your business.

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Agribusiness • Construction • Education • Government  
Healthcare • Manufacturing • Nonprofit • Real Estate  
Financial • Small & Medium Business

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### 200+ dedicated professionals

With an outstanding reputation for service and a wealth of expertise, our people are our strength. We have talented professionals who are passionate about our clients' success in every role at Yeo & Yeo.

### Giving back since 1923

From the beginning, community service has been a core of our culture. We're committed to building stronger communities through the commitment of our time, expertise and financial resources.

### Global reach

As your business looks beyond its current market and expands internationally, it's important to work with a business partner who understands the challenges of operating at a global scale. Yeo & Yeo is a member of PrimeGlobal, one of the five largest associations of independent accounting firms in the world, providing a wide range of tools and resources to help furnish superior accounting, auditing and management services to clients who have international business interests.

### Strategic partnership

When you need the skill and experience of interim finance, management and consulting professionals who are committed to you — we have the solution. Through our partnership with ProNexus LLC, we provide immediate access to C-level professionals for your most pressing business needs.







## Innovative Solutions and Practical Guidance

*Enhancing profitability, minimizing risk*

Yeo & Yeo Certified Public Accountants (CPAs) and advisors provide forward-thinking solutions to enhance profitability, minimize taxes, improve accountability and reduce risk. With your success in mind, our professionals bring strong technical capabilities combined with innovative business solutions and practical guidance. We understand your business and your industry and get to know you, providing a level of personal service unmatched in the industry.



### Audit & Assurance

YeoLEAN Audit Process

### Business Consulting

Strategic Planning • Succession Planning •  
M&A • Budgeting • Benchmarking



### YeoConsults Business Solutions

YeoConsults Outsourced Accounting • YeoConsults  
Outsourced Payroll Solutions • YeoConsults  
Internal Controls • YeoConsults Legacy Program

### Tax Planning

Tax Planning & Preparation • SALT, Federal &  
International Tax • Cost Segregation Studies •  
Estates, Trusts & Gifts

### Fraud & Forensics

### Business Valuation

### Litigation Support

### Interim Staffing

*“Yeo & Yeo has been a trusted advisor for us. It’s not because they can do the tax return and help us with our ESOP. It’s that whole next step which is the relationship and the advice.”*



## A Holistic Approach to Wealth Management

*Connecting tax advice with your wealth management goals*

Yeo & Yeo's team of financial advisors build your wealth management strategy around what is most important to you – your goals, dreams, and time horizons. Our wealth management experts work with your CPA to provide an all-encompassing and tax-efficient approach to every aspect of financial planning. We guide you through the process with advice you can trust, planning you can understand and financial strategies that make a difference.

**Asset Management**

**Financial & Tax Planning**

**Estate Planning**

**Retirement Planning for Individuals**

**Retirement Planning for Businesses**

**Insurance Planning**

**Business Transitions**

Investment advisory services are offered through Avantax Planning Partners<sup>SM</sup>. Commission-based securities products are offered through Avantax Investment Services<sup>SM</sup>, Member FINRA, SIPC. Insurance services offered through licensed agents of Avantax Planning Partners. 3200 Olympus Blvd., Suite 100, Dallas, TX 75019. The Avantax entities are independent of and unrelated to Yeo & Yeo Wealth Management.



## Technology that Grows with Your Business

*Work smarter with customized IT solutions*

Yeo & Yeo Computer Consulting helps you manage your computer systems rather than react to them. We keep your network healthy and secure, providing easy, cost-effective access to the tools, apps and data you rely on every day. Let our certified, industry-specialized engineers, technicians and software consultants design and deploy a suite of services built to seamlessly fit your specific business needs, budget and technology goals.

### Managed Solutions

YeoCare • YeoSecure

### Cloud Solutions

YeoCloud • YeoVoice Unified  
Communications • Microsoft Office 365

### Cybersecurity

### Business Continuity & Disaster Recovery

### Business Management Software

SAGE 100C • SAGE HRMS •  
ERP Solutions • Programming

### IT Consulting, Compliance & Management

### Procurement

### Ergonomics Workspace Solutions

*“We signed up for YeoCare and now Yeo & Yeo Computer Consulting continuously monitors our system. YeoCare catches and fixes issues before they can even get to me. That takes a lot of worry off my desk.”*





## Customized Business Solutions for the Healthcare Industry

*Operate more efficiently with advisors that know you and your business*

Whether you are a single-specialty practice, a multi-specialty group practice or a healthcare organization, partner with credentialed professionals who understand the complexities of your industry. Yeo & Yeo's Healthcare Services Group—experienced CPAs, medical practice consultants, billing specialists and technology professionals—can help you adapt to healthcare's changing business environment and operate more efficiently.

### Medical Billing

Insurance & Patient Billing • HIPAA Compliance

### Practice Management

Accounts Receivable Controls • Billing, Medical Chart & Financial Audits • ICD 9/10, CPT and HCPCS Coding Training • Credentialing • Efficiency & Organization Reviews

### Practice Transitions

Retiring, Selling or Joining a New Practice • Mergers & Acquisitions • Succession Planning • Financial

### Practice Valuation

Valuation & Litigation Support • Selling, Discontinuing or Expanding a Practice • Buy-in a New Partner or Associate

*“Yeo & Yeo Medical Billing & Consulting’s highly-trained team works effectively with providers and administrators to develop a road map for improved revenue recognition.”*



# Leading Healthcare and Nonprofit Advisory Firm

At Yeo & Yeo, we understand that you want to work with professionals that can help you navigate your state and federal compliance requirements. We specialize in nonprofit and healthcare audits. Using our award-winning YeoLean audit process, we help clients maximize efficiency. **What sets Yeo & Yeo apart?**

## Combined Expertise

95+ years in accounting

45+ years in healthcare

35+ years in technology



## Healthcare Experienced



Medical Practice Consultants

Billing Specialists

CPAs & Financial Planners

Valuation & Litigation Experts

Technology Professionals

## Holistic Solutions

One Comprehensive Service Provider



### Industry Experience

Yeo & Yeo has over 25 dedicated nonprofit auditors and tax strategists that provide services to over 380 nonprofit entities throughout Michigan. Our Healthcare Services Group includes more than 45 professionals focused on the healthcare industry. We have the knowledge and insight to recognize opportunities and identify specific areas of your organization that can be strengthened.

### Our People

Yeo & Yeo's experts choose their careers through experience and interest, making them extraordinarily dedicated to their work. Yeo & Yeo is known for exceptional service, professional staff and the enjoyable experience you will have while working with our team.

### FQHC Experience

Yeo & Yeo is the statewide leader of Federally Qualified Health Center (FQHC) audits., auditing more FQHCs than any other accounting firm in Michigan. Our professionals are actively involved with the MPCA, attending annual meetings to stay current with FQHC industry changes and presenting accounting updates during available breakout sessions. Our professionals also attend and present at the MPCA Finance Officers Forum.

### Staff Continuity

Yeo & Yeo maintains the same staff on our engagements year-after-year to increase efficiency and client satisfaction.





## Industry Experienced Auditors and Advisors

### Timely Communication

Our start to finish scheduling process ensures accurate pre-planning for a smooth transition. Our clients know what to expect when we arrive on site. We make it a priority to provide frequent updates and communication throughout the engagement.

### Quality

Our peer reviews have demonstrated a consistent approach to high-quality audits. You can depend on the accuracy and quality of our work.

### Partner and Management Involvement

We maintain the same partners and management on engagements year-after-year allowing you to develop valuable, time-saving relationships. Your dedicated partner-in-charge will be on site and available to you during the audit. A concurring partner will provide a high-level overview for quality control.

### Client Education

Our clients benefit from insights and education all year long. We offer complimentary trainings and regular accounting updates so that our clients have the most timely and relevant information. Yeo & Yeo authored articles, eBooks, monthly newsletters, insights and email alerts are issued for news that impacts you and your organization.

### Comprehensive Solutions

Yeo & Yeo offers comprehensive solutions through the combined knowledge of more than 200 certified professionals, including its Certified Public Accountants, Financial Planners, Professional Coders, Physician Practice Managers, Professional Medical Auditors, Fraud Examiners, Business Valuation Analysts, IT Consultants and a Professional Compliance Officer.

### Community Service and Giving Back

Giving back to the communities we serve is a fundamental aspect of our culture and core values. In 2018, we established the Yeo & Yeo Foundation, an employee-run organization dedicated to giving time, talent and financial support to charitable causes throughout Michigan. In 2020, we proudly awarded over \$105,000 to nearly 60 nonprofit organizations in Michigan.



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