



YEO & YEO

FOUNDATION

# Yeo & Yeo Foundation 2024 Annual Report

HELPING OUR MICHIGAN COMMUNITIES THRIVE

LET'S THRIVE



YEOANDYEO.COM

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## WHO WE ARE AND WHAT WE DO

Giving back to the communities we serve is a fundamental aspect of Yeo & Yeo's culture. 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. Fostering a culture of community service and volunteerism among all Yeo & Yeo employees firm-wide is at the core of the Foundation's objectives. Through the Foundation, we support and serve organizations that Yeo & Yeo associates are personally involved in or passionate about.

## Time

FOSTERING A CULTURE OF SERVICE AND VOLUNTEERISM

## Talent

SUPPORTING ORGANIZATIONS OUR PEOPLE ARE PASSIONATE ABOUT

## Treasures

GIVING BACK TO THE COMMUNITIES WE SERVE



# A Message from the Foundation's Past President

"We are only as strong as the communities we serve." It's a popular saying at Yeo & Yeo. Our culture of giving back started with the Yeo family. They believed it was vital to support the communities in which we live, work, and play.

Some of us were lucky enough to work with Lloyd Yeo, a third-generation family member and past President & CEO of the firm. Those of us who knew Lloyd saw firsthand his passion for supporting the community, and he was recognized with many awards for community service.

- In 1994, he received the Robert H. Albert Award of Community Service, presented by the Saginaw County Chamber of Commerce, an annual award recognizing a citizen from the region who has distinguished themselves over a lifetime through civic and professional achievements.
- In 1996, he received the Harry S. Lund Volunteer Award, presented by the United Way of Saginaw County.
- In 1998, he was awarded the Spirit of Philanthropy Award from the Saginaw Community Foundation.
- In 2002, he received the Delphi/Boys & Girls Club Award for Service to Youth.
- In 2008, the United Way of Saginaw County renamed the Community Involvement Award "The Lloyd J. Yeo Community Involvement Award" in recognition of his superior community service.

Lloyd passed away in 2008 at the age of 75, leaving a remarkable legacy of compassion and giving. It is his spirit of supporting others that shaped our firm into what it is today, and it is our job and honor to continue his mission through the Yeo & Yeo Foundation.

The Foundation gives each employee an opportunity to support organizations through volunteerism and financial gifts. This past year, we supported 60 organizations with \$150,066 in donations. I know Lloyd and the Yeo family would be proud. We have so much more to give, and I am excited to see how we will continue to make an impact in 2025 and beyond.



**Alex Wilson, CPA**

Principal  
Yeo & Yeo Foundation Board  
Immediate Past President

**We are only as  
strong as the  
communities  
we serve.**



# 2024 Foundation Leadership Group

## THANK YOU TO OUR 2024 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



Kellen Riker  
Manager  
Yeo Young Professionals  
Service Chair



Taylor Bartosiewicz  
Marketing Associate 2  
Communications Chair



Jeff McCulloch  
YYTECH President  
Grants/Giving Chair



Alex Wilson  
Principal  
Interim Secretary



Michael Tribble  
Partner Emeritus  
Founding Member





## THANK YOU TO OUR 2024 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 – Alex Wilson  
Principal



Ann Arbor – James Edwards  
Senior Manager



Flint – Holly Blood  
Senior Accountant



Kalamazoo – Chelsea Meyer  
Senior Manager



Lansing – Amy Jaehnig  
Administrative Assistant



Midland – Zoey Provenzano  
Manager



Saginaw – Amy Dittenber  
Administrative Assistant



Troy (former Auburn Hills) – Breanna-Faye Stadler  
Staff Accountant



YYTECH – Linda Bender  
Operations & Administration Supervisor



YYMBC – Samantha Middleton  
Credentialing Specialist



# The Numbers Behind Our Impact

## 2024 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 fifth operational year, we gave back more than \$150,066 to 60 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 2024.

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

### ANNUAL CONTRIBUTIONS

**\$146,026**

*Donations from our employees, principals and firm revenue allocation*

### AWARDED DONATIONS

**\$150,066**

*Employee-directed giving*

### RECEIVING NONPROFITS

**60**

*Organizations supported throughout Michigan and beyond*

### Income Statement

12 Months ended December 31, 2024

<b>Income</b>	
Contributions	\$146,026
Net Investment Income	<u>9,283</u>
<b>Total Income</b>	\$155,309
<b>Expenses</b>	
Donations	\$150,066
Other Expenses	<u>59</u>
<b>Total Expenses</b>	\$150,125

Annual Giving	2024	2023	2022	2021	2020
Annual Contributions	\$146,026	\$113,968	\$124,671	\$121,705	\$120,021
Awarded Donations	\$150,066	\$140,485	\$130,715	\$108,873	\$105,270
Organizations Served	60	62	56	62	58





# Organizations Proudly Served

## ALMA

- Alma Police Athletic League
- American Cancer Society
- Children's Discovery Academy
- Foster Closet of Isabella County

## ANN ARBOR

- Angel Whispers Healing Center
- Eastern Michigan University Foundation (EMU Cheer Program)
- Humane Society of St. Clair County
- P.B.J. Outreach, Inc.
- Shelter Association of Washtenaw County
- Trinity Health at Home Southeast MI Hospice
- University of Dearborn - Beta Alpha Psi

## FLINT

- Beloved Asheville
- Fenton Center for Hope
- Flushing Youth Tackle Football Programs, Inc.
- Friends of the Alley
- International Academy of Flint
- Zonta Club of Michigan



## KALAMAZOO

- Community Healing Centers
- Epilepsy Foundation of Michigan
- Kaleidoscope Kids Preschool
- Local Journalism Foundation
- WMU Essential Needs

## LANSING

- Child & Family Charities
- Give-A-Kid Projects
- MET Avivor, Inc.
- Potter Park Zoo

## MIDLAND

- Beaverton Activity Center
- Home to Stay
- Midland Community Orchestra
- Midland's Open Door

## SAGINAW

- American Cancer Society
- Bay Community Tennis Association
- East Side Soup Kitchen
- Great Lakes Bay Regional Alliance
- Saginaw Fire Department
- Thomas Township Parks & Recreation
- Undercover Angels Animal Rescue
- Valley Lutheran High School
- Westdale Elementary School PTO
- White Pine Middle School
- Wings of Mercy - East Michigan

## TROY (FORMER AUBURN HILLS)

- American Cancer Society - Making Strides of Detroit
- Child Advocacy Center of Lapeer
- Dryden Elementary School PTA
- Epilepsy Foundation of Michigan
- First Step, Inc.





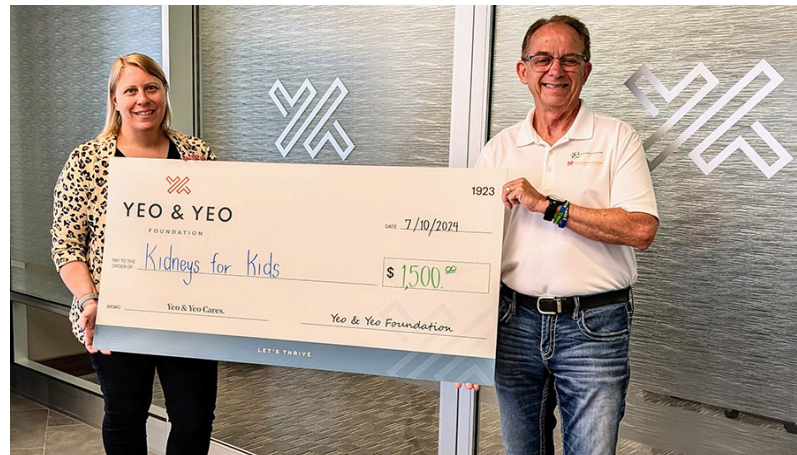
## YEO & YEO TECHNOLOGY

- American Cancer Society
- Dolly Parton's Imagination Library
- Ennis Center for Children
- READ Association of Saginaw County
- Vandal Spirit Committee

## YEO & YEO MEDICAL BILLING & CONSULTING

- Aaron's Gifts from Home
- Amazing Grace Animal Rescue
- Area 9 - Michigan Special Olympics
- Boys & Girls Clubs of the Great Lakes Bay Region
- Humane Society of Bay County
- Kidneys for Kids

Thank you to our people whose generosity and support make our giving possible.







# Yeo Young Professionals 2024 Service Project

## HABITAT FOR HUMANITY

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 chose to support Habitat for Humanity for its outstanding dedication to building homes and hope for families in need.

In June and July, Yeo & Yeo professionals participated in build projects throughout the state.

- The Saginaw team helped refresh the exterior paint of a home.
- The Flint team assisted in building a new home.
- The Troy (former Auburn Hills) and Ann Arbor teams worked to restore the exterior of two homes.

In addition to organizing this volunteer effort, the YYPs created fundraisers to benefit Habitat for Humanity.

### WATER BALLOON BONANZA

### MARCH MADNESS

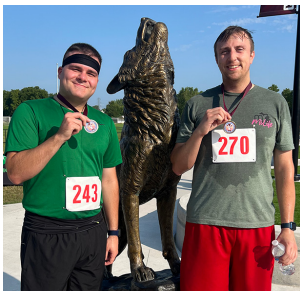
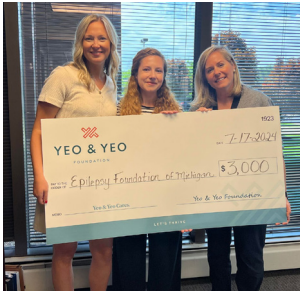
As a firm, we showed a remarkable culture of giving back and making an impact! More than \$10,600 was raised to benefit Habitat for Humanity – \$8,000 from the Yeo & Yeo Foundation and \$2,697 from Yeo & Yeo fundraisers.





# “The meaning of life is to find your gift. The purpose of life is to give it away.”

– Pablo Picasso







# YEO & YEO

FOUNDATION

## YEO & YEO FOUNDATION 2025 BOARD OF DIRECTORS

Jeff McCulloch, President

Brian Dixon, Vice President / Fundraising Chair

Jordan Hale, Treasurer

Kyle Richardson, Secretary

Samantha Middleton, Grants & Giving Chair

Taylor Bartosiewicz, Communications Chair

Michael Wilson II, Yeo Young Professionals / Service Chair

## GRANTS & GIVING / FUNDRAISING 2025 OFFICE COMMITTEE REPRESENTATIVES

Alma – Alex Wilson

Ann Arbor – James Edwards

Flint – Holly Blood

Kalamazoo – Chelsea Meyer

Lansing – Amy Jaehnig

Midland – Zoey Provenzano

Saginaw – Amy Dittenber

Troy – Breanna-Faye Stadler

YYTECH – Linda Bender

YYMBC – Jennifer Gorney

### Yeo & Yeo Foundation

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