

Empowering Equity

2023 Impact Report



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LEADERSHIP MESSAGE

New Leadership, Continued Commitment



At the Alberta Investment Management Corporation (AIMCo), we not only invest for our communities — we invest in our communities, too.

As the recently appointed chair of the AIMCo Foundation for Financial Education, I am energized by our collective commitment to Albertans through both our work at AIMCo and the volunteer-led, community-funded efforts of the AIMCo Foundation.

It's been an exciting year. With new leadership at the helm and a renewed strategic plan to guide our journey, the core of what we do remains unchanged. Every day, we are advancing financial literacy and education by mobilizing funding for innovative community grants and supportive student scholarships.

The theme for our year is *Empowering Equity*. As you read through the pages ahead, I hope it will become clear why we chose this phrase to summarize 2023.

The numbers paint an encouraging picture:

- \$350,000 distributed through community grants, more than 75% of which supported initiatives primarily serving women, Indigenous Peoples, racialized people and other equity-seeking groups
- \$260,000 committed to new scholarships in the next five years, including the launch of four awards promoting gender diversity in finance and Indigenous inclusion in business
- more than \$500,000 contributed by AIMCo colleagues and corporate partners — our single largest fundraising year to date and our first year surpassing the half-million mark

While the numbers are invigorating, far more impactful for me are the stories: those of the people who have gained new skills to transform their financial situation; of the students who were able to focus on their education instead of a daunting tuition bill; of the families new to Canada who have learned to navigate unfamiliar and complex financial systems.

These are the stories of lives changed by financial literacy and education. They are the ripples of impact that move through our community and bring us one step closer to a world in which every Albertan can realize a secure and prosperous financial future.

It is our privilege to share these stories and I hope they will mean as much to you as they have to me.

My profound gratitude goes out to our inspiring community partners, passionate volunteers and steadfast supporters for your ongoing commitment to empowering prosperity in Alberta.

Evan Siddall
Chair, AIMCo Foundation

Your Impact by the Numbers

Our Collective Impact

since inception in 2018



\$1.5 Million
invested in the community

\$1.2 Million distributed in
community grants

\$337,000 distributed in
scholarships



\$2.2 Million
donated by AIMCo colleagues
and corporate funders

2023 In Review



\$350,000
distributed in
community grants

13 financial literacy and education initiatives supported



32
undergraduate and graduate
scholarships funded

\$260,000 committed in new scholarships over the next 5 years



\$500,000
donated by AIMCo colleagues
and corporate funders

Empowering Equity



76% of community grants funding supported
initiatives serving women, Indigenous Peoples,
racialized people and other equity-seeking groups



4 new scholarships established for
gender diversity in finance and
Indigenous inclusion in business

BEYOND THE NUMBERS

Grant Recipients

This year, we welcomed two new organizations to our network of community partners and continued support of 11 previously funded organizations. These 13 initiatives, which received a collective \$350,000 in Foundation funding, encompass innovative approaches to financial literacy and are making change happen for Albertans from all backgrounds.

ABC Head Start Society

Multicultural Family Financial Literacy Workshops

Through financial planning, financial literacy training and peer networking, funding to ABC Head Start is supporting low-income multicultural families in Edmonton as they explore topics including money management, discussing money with loved ones and setting financial goals.

Africa Centre
[NEW PARTNER]

Empowering Financial Futures Project

The Africa Centre exists to create opportunities for access and full participation of the African-descent community in Alberta society. Funding is supporting tax clinics and follow-up financial literacy workshops that help new immigrants learn to navigate unfamiliar Canadian financial systems.

Bissell Centre

Financial Empowerment Project

The Bissell Centre takes an inclusive, people-centred approach to poverty reduction in Edmonton. Among its unique delivery tactics, the Financial Empowerment Project aims to embed financial literacy within the centre's support programs to increase financial well-being and boost outcomes across the board.

Bow Valley College

Centre for Financial Empowerment

Bow Valley College (BVC) is addressing the gap of financial literacy in low-income and Indigenous communities in Calgary. BVC's grant is supporting the work of Jasmine Blood, Indigenous Financial Coach, by funding resource development, elder honorariums and multimedia content delivery.

Candora Society of Edmonton

[NEW PARTNER]

Candora Employment Prep Program (CEPP) Financial Integration

With a goal to end the isolation of poverty, the Candora Society delivers participatory education programs in northeast Edmonton. Funding is supporting the development of a financial literacy curriculum for pre-employment, as well as in-person guidance through Candora's community resource centre.

**Junior Achievement
Northern Alberta
& NWT**

More Than Money Program

One of the organization's several in-classroom financial literacy offerings, More Than Money engages students in grades 4 and 5 in fun, hands-on learning. Funding is primarily supporting the play kits that contribute to the program's activity-based approach by bringing age-appropriate financial concepts to life.

**Junior Achievement
Southern Alberta**

Financial Literacy Classroom Programs

Facing continued high demand following the introduction of financial literacy learner outcomes in Alberta's elementary school curriculum, Junior Achievement Southern Alberta is directing funding toward expanding delivery of its free classroom programming for students in grades 4 to 12.

**Momentum Community
Economic Development**

Aspire Calgary Program

As Calgary's Financial Empowerment Collaborative, Momentum is directing funds to continue building out the capacity of its community partners through financial education, coaching and credentialing. This support helps organizations integrate financial literacy best practices throughout their programs.

Team Windmill

Empowering New Albertans Project

Team Windmill offers financial literacy programs and microloans to help skilled new Canadians pay the costs of accreditation and training. Funding is exclusively supporting the Empowering New Albertans project, which integrates financial literacy coaching and mentoring into the organization's program delivery.

**The Immigrant
Education Society
(TIES)**

Enhancing Financial Literacy Skills Among Newcomers and Youth Program

TIES provides financial empowerment learning to new Canadians and low-income Calgarians. Funding is expanding the reach of financial literacy education, individual counselling and tax services for newcomers and youth, equipping participants to navigate Canada's financial systems and make informed decisions.

**United Way of Alberta
Capital Region**

Empower U – Building Confident Futures Program

A collaborative effort involving 15 partners, Empower U combines financial literacy education and coaching to increase financial knowledge, tools and resources for people who are financially vulnerable. The program primarily supports women who have experienced hardship.

Wellspring Alberta

Money Matters Program

A cancer diagnosis has profound impacts on the financial well-being of patients and their families. Funding through the Money Matters program helps people navigate the unexpected financial complexities of a diagnosis, including income replacement programs, as well as taxation, financial and estate planning.

YWCA Edmonton

YOUth Retreats and Financial Literacy Weekend Workshops

With a goal to empower women toward lifelong financial literacy, YWCA Edmonton is directing funding to expand its portfolio of youth engagement initiatives. The programs provide age-appropriate education and focus on the fundamentals of money management including saving, budgeting and investing.

FEATURE

Honouring Cultural Perspectives in Financial Literacy and Education

Community grants fund initiatives that centre the diverse lived experiences of Albertans — from helping new immigrants navigate unfamiliar Canadian financial systems to supporting Indigenous students in healing their relationship with money.



Samuel Juru, Africa Centre Executive Director and Tayo El-Nathan, Financial Empowerment Initiative Executive Director

For immigrants starting a new life in Alberta, there can be lots to adapt to — whether it's frigid winter weather or the long distance from friends and family.

Many also discover the financial and economic systems of their new country are very different from what they previously knew.

"Money and financial issues in many places in the Global South exist in the informal economy," says Samuel Juru, executive director of the Africa Centre, a non-profit organization based in Edmonton and serving communities of African descent across Alberta.

"Government regulations and things like having an annual tax regime is limited to big business participation. In Canada, however, that tax regime and system exist at the individual and household level."

As a recipient of an AIMCo Foundation for Financial Education community grant, the Africa Centre is helping newcomers and others navigate Canada's tax structures and broader financial systems, in partnership with the Financial Empowerment Initiative.

An accessible entry point into more comprehensive financial education, free tax clinics held daily through the busy tax season recently reached approximately 800 community members.

The process helps people reconcile the difference between what they've earned and how much they've been taxed throughout the year. It also ensures that community members who are entitled to programs such as the Canada Child Tax Benefit or the Carbon Tax Rebate have access to them.

"Your inability to do something as simple as pay for an accountant to help with your taxes has a lot of implications in terms of your general ability to balance out, and implications on the citizen in terms of downstream participation," says Juru.

The process also helps community members better understand the broader Canadian financial system and how they can operate within it. The tax clinics are staffed by Black accountants with professional designations. Juru says that finances are a personal matter — some newcomers might see filing taxes as an overreach by the government into personal affairs. Others might be embarrassed by their financial situation.

Sitting across from an accountant who looks like their clients, and may have some of the same life experiences, reduces barriers such as fear or discomfort, which can prevent full economic participation, says Juru.

The tax clinic is also viewed as an opening for clients to discover other financial empowerment programs. Tayo El-Nathan, executive director of the Financial Empowerment Initiative, says those programs tackle issues such as budgeting, best practices for running a small business, and paying down debt.

Fundamentally, they're about changing people's attitudes towards money.

"For many immigrants, it feels like things happen to us. The war happened and it hit us. Once things happen to you, you find yourself just trying to make sense of it," says El-Nathan.

"We want to see success stories of savings, property ownership, stability, and growth. Having a financial future — that is something you built — not something that just happened to you."



Samuel Juru, Africa Centre Executive Director

Culture is Key to Healing Relationships with Money

The idea of changing a person's outlook on their finances is something Jasmine Blood brings to her work that connects her with another demographic — Indigenous students, whose ancestors have lived on the lands of Alberta since time immemorial.

As the Indigenous Financial Coach at Bow Valley College in Calgary, a position supported by the AIMCo Foundation, Blood helps students navigate the world of scholarship and grant applications. She also helps students explore the historical context that affects their relationships with money.

Indigenous people in Canada face complex challenges including the ongoing impacts of residential schools, which have left generations of Indigenous people with trauma that affects their daily lives, and colonial policies like the Indian Act, which systemically excluded Indigenous people from full participation in the Canadian economy. These issues, among other barriers, have contributed to higher poverty levels amongst Indigenous people in Canada, as well as less generational wealth being transferred to younger generations.

At the same time, Blood — who is Niitsitapi (Blackfoot) — describes different cultural attitudes towards wealth.

“We believe that people are born with a purpose. Everyone has their own skills, gifts, talents, and abilities that will shape them in a way to help society. Wealth is measured by family connections and how you contribute to community.”

Using that outlook, Blood urges students to focus on building their self-esteem and investing in themselves and their passions, as part of a path to overall well-being.

“Your financial success is correlated to your self-esteem.”

“When people have low self-esteem, it will affect their finances because they're more prone to self-sabotage, or they don't feel worthy, so they don't invest in themselves.”

Blood, who has held the position since 2022, recalls working with a young student who had been allowing several relatives to stay in her home without paying for rent or food. Blood didn't know it at the time, but the student had also been dealing with an addiction.

The student recently visited Blood and shared that the workshops had helped her take steps to change her life, including setting boundaries with her family. The student is now sober.

“Students are not just walking away with budgeting skills. They're walking away with self-worth, confidence, and self-awareness,” says Blood.

“I could show them how to budget but nothing's going to change unless their thoughts about and relationship with money change first.”



Jasmine Blood, Indigenous Financial Coach with Bow Valley College

BEYOND THE NUMBERS

Scholarships Portfolio

With scholarships and bursaries funded at six of Alberta's leading universities and technical colleges, the AIMCo Foundation is investing in the next generation of finance and business leaders.

We are supporting undergraduate and graduate students pursuing a range of business specializations, with nearly half of our funded awards directed toward people from diverse backgrounds and those who experience financial need.

MacEwan University

Funding supports five scholarships annually for undergraduate students majoring in finance or accounting, with a preference given to women.

**Northern Alberta
Institute of Technology**

Funding supports five scholarships and bursaries annually for undergraduate students majoring in finance or accounting. Specific awards are available for women, students who identify as Indigenous or students experiencing financial need.

**Southern Alberta
Institute of Technology**

Funding supports five scholarships annually for undergraduate students majoring in finance or accounting.

University of Alberta

This recently renewed awards portfolio funds 11 scholarships for undergraduate and graduate students majoring in a variety of business programs. Specific awards are available for Indigenous students or those who identify as part of a gender minority.

University of Calgary

This recently renewed awards portfolio funds seven scholarships for undergraduate and graduate students majoring in a variety of business programs. Specific awards are available for Indigenous students or those who identify as part of a gender minority.

University of Lethbridge

Funding supports three scholarships and bursaries annually for undergraduate students majoring in finance or accounting experiencing financial need.



"Receiving this scholarship allows me to pursue my passions — particularly during my MBA program, where I aim to deepen my knowledge of financial analysis and investment strategies consistent with the principles of value investing. Your acknowledgment of my potential and your generous support deeply strengthen my determination to continue my career journey in finance."

— **Guoxu**, master's of business administration candidate, University of Alberta

FEATURE

Investing in the Diversity of Alberta's Next Generation of Financial Leaders

New Foundation scholarships support gender diversity in finance and Indigenous inclusion in business at two leading post-secondary institutions in Alberta.

A shared goal across the investment industry, increasing diverse representation in the workforce, starts long before recruitment.

It starts with engaging young people in financial education, fostering a diverse talent pool and dismantling barriers that limit opportunities for diverse populations — barriers like rising tuition costs associated with obtaining a formal post-secondary education in business and finance.

Scholarships Expand Access to Financial Education

As part of broader multi-year funding agreements totaling \$260,000, the AIMCo Foundation for Financial Education has established four new equity-focused scholarships at the University of Alberta (U of A) and the University of Calgary (UCalgary).

“Students from diverse backgrounds face unique barriers when it comes to accessing education and opportunities related to business and finance,” says Shayenne Selleck, executive director of the AIMCo Foundation. “Our goal is to help alleviate the financial burden associated with post-secondary education, so these students can focus on their studies and excel in their chosen fields.”

The awards support women and gender diverse students in finance and Indigenous students in business, two populations that are significantly underrepresented in the investment industry.

For Selleck, a U of A alumna and first-generation college graduate who studied mathematics, the commitment to increasing representation is personal.

“Having been through a degree program in which I was almost always one of only a few women in the room, I know firsthand how isolating that experience can be,” says Selleck.

“I was lucky enough to receive student awards targeted to women in my field and they did more than ease the anxiety around my tuition — they reminded me that I belonged in this program where I rarely saw people like me.”

The new scholarships with the U of A and UCalgary expand the Foundation's existing equity-focused award offerings, which include scholarships for women in finance and Indigenous students in business at the Northern Alberta Institute of Technology and MacEwan University.

Encouraging and Developing a Diverse Talent Pool

It takes wrap-around supports from early years into post-secondary and throughout career development to move the needle on diversity goals in the workplace.

To that end, AIMCo Foundation community grants fund several initiatives that deliver age-appropriate financial literacy for children and youth, and cultivate an early interest in financial education.

Beyond the Foundation, AIMCo helps students and new professionals find their career footing while ensuring all colleagues are part of an inclusive culture across the organization.

Named one of Canada's Top Employers for Young People in 2023, AIMCo offers rotational training, industry mentorship and opportunities for junior employees to take a hands-on role on large projects — all of which

promote a collaborative environment that allows young colleagues to thrive. AIMCo also fosters grassroots, employee-led initiatives like peer networks for women, Indigenous colleagues and allies to build connection and belonging among a growing global team.

Each community program, student award and workplace initiative contributes to a common goal: levelling the playing field and driving diversity, equity and inclusion in the investment industry.

"Scholarships are just one small piece of the puzzle," says Selleck. "More than anything, I hope these awards help reinforce to women, gender diverse and Indigenous students that they can take up space — that they're welcome in their university programs and as part of the investment industry more broadly."



PARTNERS IN PURPOSE

Corporate Donor Honour Roll

Each year, our corporate partners rally to fund innovative community grants and supportive student scholarships. And 2023 was no different, with a record-breaking \$300,000 donated, as well as an additional \$100,000 generated through in-kind fundraising contributions.

While our funding distribution is focused in Alberta, our supporters span the globe. Knowing the far-reaching impact of financial security and economic prosperity, it's easy to see why.

Thank you to our corporate partners for your ongoing generous investment in financial literacy and education.

Platinum \$10,000+

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BMO Capital Markets
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PARTNERS IN PURPOSE

Our People

The AIMCo Foundation is led primarily by a group of passionate volunteers who oversee our governance and implement our operations. From mobilizing employee and corporate giving to negotiating scholarship agreements to reviewing, recommending, and coordinating community grants and so much more, the following people donated their time and skills in 2023 to bring all the accomplishments in this report to life.

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FEATURE

Reduce. Reuse. Raise \$110,000.

Sustainability and creative problem-solving combine to mobilize employee fundraising.

When Dave Schoenberger recognized an opportunity in 2018 to centralize AIMCo's corporate cellphone program, he did more than save the organization money and streamline operations. He kickstarted a new avenue of fundraising to rally his colleagues and empower prosperity in Alberta.

Due to strict security requirements, AIMCo ensures colleagues have compliant, up-to-date devices that allow them to work safely and efficiently. This means every few years, eligible AIMCo employees must upgrade their corporate-issued cellphones to a newer model.

Through the Technology Buyback program created and championed by Schoenberger, colleagues who are due for an upgrade are given the option to purchase their old device with the proceeds of the sale going directly to the AIMCo Foundation.



Doug Huget, Dave Schoenberger and Mohammed Arslan (left to right)

“The way I see it, we’re solving three problems at once,” says Schoenberger, who recently celebrated his 30th year with AIMCo. “We’re reducing our waste, people are getting to keep a device they want and we’re supporting the community. It’s a win-win-win.”

After observing the success of the buyback program, Schoenberger thought: why stop there? Phones and tablets were not the only items that needed periodic upgrading to ensure AIMCo employees could do their best work securely.

That’s how the Global Technology and Data (GTD) team began contributing the most in-demand items of the AIMCo Foundation’s much-loved annual silent auction: refurbished laptops.

Selling for anywhere from \$300 to \$500 each, these laptops are known to inspire fierce (and friendly) competition as people from across AIMCo bid to secure coveted holiday gifts for friends and family.

These days, the buyback program and auction contributions are being implemented by members of the GTD team including technical analysts Mohammad Arslan and Doug Huget.

“Seeing the competition between AIMCo colleagues is really fun,” says Huget, who coordinates the preparation of the devices that will be auctioned off. “While we never would have thought people would be so enthusiastic about preloved technology, our colleagues have proved year after year the immense value they see in these programs.”

“The upgrades have to happen regardless to keep everyone compliant with security standards,” says Arslan. “These initiatives have been a great way for us to meet that need while creating an opportunity for colleagues to give back to a cause that’s important to them.”

Since their conceptualization in 2018, the Technology Buyback program and tech donations to the Foundation’s silent auction have mobilized more than \$110,000 in employee contributions.

That’s the equivalent of the average cost of four community grants.

The initiatives exemplify a popular adage: it all adds up.

With each device being rehomed for between \$100 and \$500 depending on its market value, age and functionality, no one person is paying big money for an individual item. Instead, more than 450 donations over six years have collectively ignited change for community partners and students in Alberta.

“It’s mindboggling, the impact this has had,” says Schoenberger when presented with the aggregate numbers for the first time. “Though in some ways, it’s not surprising. It’s like how a small investment grows over time — it’s many small hands coming together to lift up one big thing.”

LOOKING AHEAD

Prioritizing Sustainable Growth and Community-centred Impact



What comes to mind when you think of financial literacy and education?

Maybe the term conjures an image of saving and budgeting, or debt and debt repayment, or retirement planning and investing.

Or, if you're like me, maybe it stirs up a mix of emotions: the isolation of managing your money through life-changing illness, the anxiety of reaching out for help around an often-undiscussed topic, the uncertainty of whether conversations around finances will strengthen or strain your closest relationships.

When I joined the AIMCo Foundation for Financial Education as its new executive director in May 2023, I spent a lot of time mulling over what it meant to empower prosperity for all Albertans.

Financial literacy is about much more than the fundamentals of money management. A lack of financial literacy can feel like a personal failing when, in reality, it's a complex topic interwoven with systemic barriers that are experienced differently depending on your background and life circumstance.

Throughout the past few years, the Foundation has marked major milestones — successes we didn't expect to achieve until much further into our maturation. By 2021, we had surpassed \$1 million raised. By 2022, we had distributed more than \$1 million in community funding. And in 2023, we realized \$2 million in funds raised and more than \$1.5 million directed through grants and scholarships since our inception.

While we have much to be proud of, I believe our greatest accomplishment is the broad and inclusive approach we take in pursuit of our mission.

Our community partners are delivering programming to audiences of all ages, backgrounds and circumstance. With funding from the Foundation, they're tackling financial literacy from all angles: from basic money management to system navigation to financial coaching and everything in between. On top of that, we're supporting the next generation of leaders in business and finance through student awards that help make this career path accessible to everyone.

The past five years have been remarkable — and we are just getting started.

It's clear we've found our footing and settled into our role as a mobilizer of funding to community changemakers. As we chart a path for the years ahead, I am inspired by the opportunities that lay before us to sustainably grow our reach and impact while continuing to centre community needs and the voices of our partners on the ground.

Shayenne Selleck

Executive Director, AIMCo Foundation

Thank you for empowering prosperity.

Your support of financial literacy and education is changing the lives of Albertans through innovative community grants and impactful student scholarships.

AIMCo Foundation for Financial Education

1600-10250 101 St NW, Edmonton, AB T5J 3P4

Charitable registration # 77374 3281 RR0001

The AIMCo Foundation for Financial Education is dedicated to empowering prosperity in people and communities.

We offer grants to Alberta-based not-for-profit organizations focused on financial empowerment programs or services, and scholarships or bursaries through Alberta post-secondary education institutions offering formal finance education.

aimcofoundation.ca

