



## Granting Guidelines 2025

Thank you for your interest in partnering with the AIMCo Foundation for Financial Education to empower prosperity in Alberta. We look forward to learning more about your organization and how you're advancing financial literacy and education.

Please review these guidelines closely to ensure you are well suited to the AIMCo Foundation community grant funding opportunity prior to putting time and effort into preparing an application.

**Grant application submissions open Monday, May 5, at 9 a.m. MT and are due Friday, June 13, at 11:59 p.m. MT.** More information about our granting process, as well as a link to begin your application submission (once live), can be found at [aimcofoundation.ca/apply-for-a-grant](https://aimcofoundation.ca/apply-for-a-grant).

**Questions?** We're here to help! Contact us at [aimcofoundation@aimco.ca](mailto:aimcofoundation@aimco.ca) or 825.404.9119.

## Eligibility Criteria

The AIMCo Foundation provides grants to charitable organizations registered with the Canada Revenue Agency or qualified donees as defined under the Income Tax Act. In alignment with our charitable purpose, funded initiatives must focus on advancing financial literacy and education in Alberta. The AIMCo Foundation does not fund religious organizations, with the exception of non-faith-based initiatives.

In addition to the above requirements, we recommend that applicants be able to provide professionally audited financial statements with an unqualified audit opinion. We will consider applications from organizations with a qualified audit opinion or who fall below the income threshold at which the Canada Revenue Agency recommends a professional audit; however, we encourage you to reach out to us prior to preparing your application.

## Eligibility Survey

Before you dedicate time and resources to preparing your funding application, we want to make sure your initiative meets the base requirements for funding.

We ask all interested organizations to begin by confirming eligibility through a short survey. If you meet all the requirements for funding, you will be invited to set up a profile on our application portal, where you can prepare and submit your application.

## Contact Information

Please enter the contact information for the primary contact for this funding application.

First Name

Last Name

Organization Name

Contact Title

Contact Phone

Contact Email

## Organization Identification

Operating Name

Country

Street

City

Province

Postal Code

Organization Phone

Organization Email

Website

Facebook

LinkedIn

Other Social Media

## Eligibility Screening

1. Is your organization either a charitable organization registered with the Canada Revenue Agency (CRA) or a qualified donee as defined under the Income Tax Act?
  - Yes, charitable organization registered with the Canada Revenue Agency
    - Please provide your CRA Registration Number:
  - Yes, qualified donee as defined under the Income Tax Act
  - No, neither
  
2. Is your organization applying for funding for a non-faith-based initiative?
  - Yes
  - No
  
3. Is the program or project for which you are seeking funding focused on advancing financial literacy and education?
  - Yes
  - No
  
4. Are the beneficiaries of the program or project for which you are seeking funding located in Alberta?
  - Yes
  - No
  
5. Do you have professionally audited financial statements for the most recently completed fiscal year or the year prior?
  - Yes
    - What was the auditor's opinion provided on your most recently completed audit?
      - Unqualified
      - Disclaimer of opinion
      - Qualified
      - Adverse
  - No
  - Not applicable

## Grant Application Process

If you successfully pass the eligibility survey, you'll be invited to complete a funding application through our online portal. **Grant application submissions open Monday, May 5, at 9 a.m. MT and are due Friday, June 13, at 11:59 p.m. MT.**

Following submission, the AIMCo Foundation reviews all applications. If we have additional questions or feel certain information would help us better evaluate your initiative, you may be invited to participate in a brief interview.

Typically, funding decisions are communicated before the end of the year with payment made to successful projects between December and February. Regardless of funding outcomes, all applicants will be informed of funding decisions by email as soon as board approval is given.

## Preparing Your Application

Throughout the form, we have included prompts to help you determine what to include in your responses. You do not need to address every prompt in your response. Consider them as a jumping-off point to tell us more about your initiative.

When you move to a new page, your progress will automatically be saved. At the end of the application, you'll have the option to submit your application or save it and return later to make changes.

The application will guide you through the following sections:

1. **Organization information:** Tell us about your organization and mission, as well as the community partners with which you're working to make change happen.
2. **Project details:** Tell us about the initiative for which you're seeking funding — why this solution, for whom, and why now?
3. **Budget and timelines:** Share the numbers — how much funding are you requesting, what's the overall budget, and what is the project timeline? You'll also be asked to upload a program budget file.
4. **Alignment with the National Financial Literacy Strategy:** Let us know if your initiative ties into the Government of Canada's [National Financial Literacy Strategy](#). Information shared in this section is for reporting purposes only — your responses here will have no impact on funding decisions.
5. **Supporting documents:** Attach any files that will help us evaluate your funding request.
6. **Uploaded files:** Review the titles of your attached files prior to submission.

The Foundation takes a broad and inclusive approach to the concept of financial literacy and education. We aim to support initiatives that advance our mission, and:

- present a practical and detailed plan for implementing the initiative on time and within the presented budget
- field test promising ideas and evaluate results or take proven ideas and approaches to scale
- present a unique approach in content or delivery (or both) for the target community
- encourage strategic collaboration with partners, whether in non-profit, public, or for-profit sectors
- show promise for sustainable impact once Foundation funding ends
- use success measures that are well thought out and relate to the intended goals of the initiative

You can read a summary of all programs funded in our [most recent round of community grants](#) to get an idea of the breadth of initiatives we support.

## Application Questions

Note that none of the questions in this application form are required fields. Please use them to guide your submission and categorize your ideas, if needed. The more information you share, the easier it will be for our review committee to fairly assess your application.

If you feel some questions are better answered through supplemental materials or video responses, you can leave questions blank and instead submit attachments at the end of the application.

### Tell us about your organization

1. Describe your mission in one sentence.
2. How are you working toward your mission? Briefly describe your organization's current activities, recent accomplishments and expected future endeavors.
3. With whom are you working to achieve your goals? Who are your key community partners, primary funders and associated agencies?
4. Who are the primary beneficiaries of your work and how are they involved in your organization?

### Tell us about your project or program

5. What is the name of the initiative for which you are seeking funding?
6. Tell us about the initiative for which you are seeking funding.  
*Consider (you do not need to answer each prompt): What is the initiative? What is the implementation plan and how was it developed? If this is an existing program, how have you refined your approach or deepened your impact over time? Who is the target audience of this initiative?*
7. Tell us about your project or program team.
8. What problem or need does your initiative address?  
*Consider (you do not need to answer each prompt): What qualitative or quantitative information do you have to indicate the breadth or depth of need? What is the potential impact of this initiative? Why this initiative, and why now?*
9. Who are the key partners with whom you'll be working on this initiative?
10. How will you know if your initiative has been successful?  
*Consider (you do not need to answer each prompt): In what ways will the existing problem or need be addressed by your initiative? What will be different in 1, 5 or 10 years if your initiative is successful? Do you have a measurement plan in place for your initiative? If yes, what are some key performance indicators that will be used to measure success?*
11. Which of the following target audiences (if any) is your initiative intentionally designed to serve?  
Please select a maximum of three primary audience(s).
  - Indigenous Peoples
  - Members of the LGBTQ2S+ community
  - People with disabilities and / or their caregivers
  - Racialized people
  - Recent immigrants
  - Women
12. If applicable, how is your initiative engaging the above-noted groups?  
*Consider (you do not need to answer each prompt): How does this initiative uniquely support the needs of the identified groups? How has this group been involved in the planning or implementation of your initiative? How will they benefit from this initiative?*

## Tell us about your budget and timeline

13. What is the amount of funding you're requesting from the AIMCo Foundation?
14. What is the total budget for this initiative? You'll be asked to upload a budget breakdown in the next section of the application.
15. What is the timeline for this initiative? What is the anticipated start date? When do you expect the initiative to conclude?
16. What funding, if any, have you secured to date, and from whom? Please note any confidential or anonymous contributions as one 'confidential' contribution.
17. What are the potential impacts of this funding request?

*Consider (you do not need to answer each prompt): How will the success of this funding request influence your project success? Will it broaden reach or deepen impact? Can your initiative proceed without this funding? If you receive only partial funding, what will the impacts be on your initiative?*

Please upload any budget planning documents that you believe would assist us in evaluating your project.

## National Financial Literacy Strategy Alignment

*Please note, information shared here is for reporting purposes only — your responses to this section will have no impact on funding decisions.*

In 2021, the Government of Canada launched a 5-year plan to create a more accessible, inclusive and effective financial literacy ecosystem for all Canadians. As the AIMCo Foundation seeks to further understand how its community funding is advancing financial literacy and education more broadly, we're interested in knowing whether your initiative aligns with any of the ecosystem priorities or consumer impacts outlined in the strategy or measurement plan. More information about the National Financial Literacy Strategy is available on the [Financial Consumer Agency of Canada website](#).

18. Which of the following ecosystem priorities (if any) of the National Financial Literacy Strategy are addressed by your initiative?
  - Communicate in ways people understand
  - Build and provide for diverse needs
  - Support increased digital access and digital literacy
  - Enhance access to trustworthy and reliable financial help
  - Use behavioural design to simplify financial decisions
  - Strengthen consumer protection measures
19. Which of the following consumer impacts (if any) of the National Financial Literacy Strategy are advanced by your initiative?
  - Navigate the financial marketplace
  - Manage expenses, debt and savings
  - Build just-in-time financial knowledge and confidence

20. Comments:

## Supplemental Materials

Please include any other files that will help us evaluate your application (e.g.; annual reports, media articles, program photos).