

2024 Impact Report

Empowering Access



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LEADERSHIP MESSAGE

Financial Empowerment Needs to Meet the Moment for Albertans



When it comes to financial literacy, getting the right information to the right person at the right time can be the difference between financial precarity and stability.

In a province as multi-faceted as Alberta, the barriers to accessible financial education can take root in many ways. Alberta is home to people of all ages spread across dense urban centres and sparsely populated rural and remote regions, presenting a unique challenge in addressing gaps in financial literacy.

We know people who are financially vulnerable have distinct financial education needs at different points in their lives and based on their individual circumstances.

That's why the AIMCo Foundation for Financial Education is focused on empowering access to financial literacy and education for everyone who calls our province home.

I am humbled to share that the Foundation experienced unparalleled support and generosity in 2024. With more than \$585,000 raised from AIMCo colleagues and corporate partners, it was our most successful fundraising year to date. As a result, we were able to distribute record annual funding to the community, with more than \$450,000 going directly back to nonprofit organizations and students across our province.

These incredible achievements reinforce our shared belief in the transformative power of financial literacy and the importance of investing in our community's future.

As I reflect on these outcomes, I am reminded that our success is measured not only by the funds we raise

and distribute but also, more importantly, by the impact we create. Each dollar contributed and each grant and scholarship awarded represents a step toward a more secure financial future for all Albertans.

In this report, you'll find stories that highlight how financial empowerment changes lives — from acting as an unexpected protection against the dangers of elder abuse to supporting those in our community going through unimaginably hard times as they work to rebuild their lives and find a path to financial stability.

While I am immensely proud of the accomplishments and stories shared in this report, the data from last year's round of community funding requests deeply reinforces that there is more work to do.

In 2024, we received an unprecedented number of applications totalling more than \$1.6 million. Each initiative explores in its own way the broad intersectional impact of financial literacy and education for communities throughout Alberta. This surge in demand speaks to the growing need for accessible financial education and is a clear indication that our work is more vital now than ever before.

I am grateful to be on this journey with the donors, community partners, students and volunteers who reinforce every day the immense value of financial empowerment for Albertans. Thank you for an incredible 2024, and I look forward to all that the year ahead will bring.

Shayenne Selleck

Executive Director, AIMCo Foundation

Your Impact by the Numbers

Our Collective Impact



\$2.7 Million raised from AIMCo colleagues





charitable partners and post-secondary institutions supported



\$2 Million invested in the community

\$1.6 Million distributed through community grants

\$400,000 distributed through scholarships and bursaries

2024 In Review



\$384,100distributed through community grants

20 financial literacy and education initiatives supported



6 scholarship portfolios funded through Alberta universities and technical colleges

36 undergraduate and graaduate scholarships funded



\$585,000 raised from corporate funders and AIMCo colleagues

Empowering Access



8 new community partners expanding access to financial literacy education to rural and remote regions, and underserved populations.



2 new multi-year community grant commitments to ensure sustainable funding for highly impactful financial empowerment programs.

BEYOND THE NUMBERS

Grant Recipients

In 2024, the Foundation expanded its reach to new regions and audiences. Thanks to accelerated fundraising success paired with an emphasis on broad impact, we welcomed 8 new community partners to our ranks, distributing more than \$380,000 to a total of 20 Alberta-based financial literacy initiatives — a record annual high.

From funding programming for underserved audiences, including seniors and people with disabilities, to ensuring accessible financial education for people living in areas like Hinton and Vulcan County, the Foundation is proudly working alongside community partners to ensure all Albertans have what they need to improve their financial health and security.

Africa Centre

Financial Empowerment Initiative

Through free community tax clinics and follow-up financial literacy workshops, the Africa Centre is meeting Alberta's African-descent community where they are. Funding is supporting newcomers in Edmonton and Calgary as they learn to navigate unfamiliar Canadian financial systems.

Alzheimer Society of Alberta and Northwest Territories

[NEW PARTNER]

Finance and Dementia Podcast Episode

The Alzheimer Society of Alberta and Northwest Territories is using funding to create a podcast episode focused on financial literacy, customized for a target audience of those living with Alzheimer's Disease and related dementias. This unique initiative will support a population that can be vulnerable to financial disinformation.

ASSIST Community Services Centre

[NEW PARTNER]

Digital Literacy Integration for ESL Financial Success Journey

ASSIST works with newcomers to Canada and has recognized a need for financial literacy education to support English language learners and those unfamiliar with the digital financial landscape. Funding will address language barriers within the context of personal financial management, and build skills related to online banking, budgeting apps and fraud awareness.

Autism Independent Living Association

[NEW PARTNER]

Financial Education Videos for Adults with Autism

By recognizing that personal financial management is essential for independent living, the Autism Independent Living Association is committed to improving the financial literacy of its clients. Funding will support the development of educational videos, tailored to meet the learning styles of those on the autism spectrum.

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 other supportive programs to increase financial well-being and boost outcomes across the board.

Bow Valley College

Centre for Financial Empowerment

Bow Valley College is addressing the gap of financial literacy in low-income and Indigenous communities in Calgary. Funding is supporting the work of Jasmine Blood, Indigenous Financial Coach, through resource development, elder honorariums and multimedia content delivery.

Carya Society of Calgary

Improving the Living Conditions of Vulnerable Senior Calgarians through Financial Education

The Carya Society of Calgary works with vulnerable seniors and is empowering them to better navigate the financial and benefits systems they regularly encounter. Funding will support a Financial Education Coordinator who will oversee workshops and an annual tax clinic.

GROW Women Leaders through YWCA Edmonton

[NEW PARTNER]

Nurture Meals From Around the World Project

When immigrant and minority women in Edmonton enrol in this transitional employment program, they will also be offered material and instruction focused on financial literacy. By using funding to integrate financial literacy material into its broader, employment-focused programming, GROW Women Leaders is meeting women where they are at.

Hinton Adult Learning Society

[NEW PARTNER]

Community Financial Literacy Project

Following the devastating wildfires in the Jasper area, which increased instability in an already cyclical economy, the Hinton Adult Learning Society recognized the need to deliver a series of financial literacy seminars. Funding will support program delivery to low-income people on topics of personal financial management and building resilience in a volatile economy.

Junior Achievement Northern Alberta

Investment Strategies Program

The Investment Strategies Program prepares grade-school students for an online stock market simulation. Through an immersive and engaging approach, students learn how to research stocks, build portfolios and understand the ethical implications of financial decisions.

Junior Achievement of Southern Alberta

Financial Literacy Classroom Programs

With tailor-made programming for students from grades 4 to 12, Junior Achievement of Southern Alberta will direct funding toward the expansion of their financial literacy programs including More than Money, Dollars with Sense, Economics for Success, Investment Strategies and Personal Finance.

Momentum

Aspire Calgary Program

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

Project Adult Literacy Society (PALS)

[NEW PARTNER]

Money Basics Program

Funding will support the Money Basics program, which works with clients with very low levels of financial literacy and numeracy skills. PALS is a long-time leader in this sector, working with Edmontonians who want to improve their foundational skills in literacy, math and digital literacy.

Rainbow Literacy Society

[NEW PARTNER]

Senior Financial Literacy Empowerment Program

In partnership with local nonprofit organizations in the Vulcan area, the Rainbow Literacy Society is working with a population that is particularly vulnerable to financial abuse and fraud. Funding will support the delivery of programming to seniors focused on increasing financial literacy and awareness of financial manipulation, and providing guidance on tax and pension benefit systems.

The Immigrant Education Society (TIES)

Financial Success for Canadians and Newcomers (FISCAN) Project

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 the 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.

Windmill Microlending

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, integrating financial literacy coaching and mentoring into the organization's program delivery.

YMCA of Northern Alberta

[NEW PARTNER]

Youth Transitions Program

YMCA of Northern Alberta's Youth Transitions Program takes youth from at-risk to future-ready by connecting youth with a support worker who encourages positive behaviors and provides help navigating challenging situations. Funding will allow for the integration of a money management component to strengthen financial literacy.

YWCA Edmonton

YOUth Retreats and Financial Literacy Weekend Workshops

With a goal to empower women toward lifelong financial literacy, WCA 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.

BEYOND THE NUMBERS: FEATURE

From Rural Counties to the Inner City, Financial Education Makes an Impact

Program partnerships and integrated financial literacy education expand access to underserved populations across Alberta.



Financial education often strives for traditional outcomes like equipping people to better manage their personal finances. But it can also serve unexpected purposes — like acting as a powerful protection against elder abuse.

Gabrielle Kirk works with seniors in Vulcan County and when she encounters cases of elder abuse, it most often involves financial abuse.

"We see people who are either being pressured into giving power of attorney to someone whom they don't really trust, or their existing power of attorney is misusing their finances," says Kirk, director and case manager at the nonprofit organization Senior Protect.

While Kirk travels around the sprawling county to visit seniors, Senior Protect has identified a new opportunity to help more clients by having an elder abuse prevention worker based in the Town of Vulcan. What started as an idea for improved financial education access is becoming a reality thanks in part to an AIMCo Foundation community grant provided to program partner Rainbow Literacy and Learning Society.

The rural hamlets and villages surrounding the Town of Vulcan have a high proportion of residents over the age of 65. Many seniors regularly visit the Vulcan & Region Family and Community Support Services (FCSS) building, which hosts tax clinics, a food bank and other programming. This well-known and well-attended space is where the new elder abuse prevention worker will be based as part of a partnership between Senior Protect, FCSS and the Rainbow Literacy and Learning Society.

"I feel like there's not always a lot of respect for seniors," says Barbara Moore Coffey, the executive director of the Rainbow Literacy and Learning Society, when asked why she wanted to get involved in this project. "I see how wrong this kind of abuse is, and it irks me."

Kirk has seen seniors who have been swindled out of tens of thousands of dollars, or others who have been convinced to send monthly cheques to friends or family who have no reason to take the money. While phone or internet scams get a lot of media attention, Kirk says most elder financial abuse is done by friends or relatives of the senior.

The elder abuse prevention worker will connect with seniors and families to share simple and effective safeguards that help prevent elder financial abuse. Some examples include establishing a trusted power of attorney, if appropriate, and limiting the use of cash or credit cards. The latter can be achieved by making sure that the senior's funds are received via direct deposit and that payments are made through automatic withdrawals as often as possible.

The elder abuse prevention worker will also support seniors in accessing all the financial benefits that might be available to them, be it Old Age Security payments or the Guaranteed Income Supplement.

Weaving Financial Literacy Education into Critical Frontline Support Services

About 420 kilometres north of Vulcan, in Edmonton's downtown core, Sophia Mejia works with another population for whom access to quality financial empowerment education can be difficult.

The Bissell Centre supports people with very low incomes as they move out of poverty. For people who are unhoused or living on social assistance, financial decisions can affect every part of their lives. Through grant funding from the AIMCo Foundation, frontline staff at the Bissell Centre are equipped to provide financial education, no matter what issue might bring a client through their doors.

"Financial education overlaps with lots of things," says Mejia. She notes that a client might want to be assessed for Fetal Alcohol Syndrome, the results of which could affect their application for the Assured Income for the Severely Handicapped (AISH) benefit — a vital step for creating stability in some people's lives. "You can't get housing without an income," says Mejia.

Applying for AISH is a long and time-consuming process that involves a lot of paperwork. Bissell support workers can help clients navigate that system, sometimes starting with the very basic step of ensuring that a client has proper identification.

Mejia notes that when case workers are familiar with different financial benefits and systems, they can help

with many different issues. In one case, a client received a \$35,000 payment through the "Cows and Plows" settlement, established to compensate First Nations for agriculture benefits that were promised in treaties but never paid out. Thanks in part to community funding from the AIMCo Foundation, Bissell Centre staff were equipped to help the client develop a plan for the money and accompanied the client to the bank to set up a Tax-Free Savings Account and purchase Guaranteed Investment Certificates.

"We do monthly check-ins with staff about successes and challenges, and I always get someone stating they helped someone with budgeting or other financially important elements like holding proper personal identification," says Mejia. "Financial issues always pop up."

With thoughtful, tailored programs and engaging initiatives for all ages, AIMCo Foundation community partners are ensuring financial empowerment services are accessible to those who need them most. The AIMCo Foundation is proud to have awarded more than \$1.6 million to 27 community partners since inception in 2018. If you are or know someone who is empowering access to financial education in Alberta, keep an eye on our website for details on upcoming funding opportunities.



BEYOND THE NUMBERS

Scholarships Portfolio

Through scholarships and bursaries funded across the province, the AIMCo Foundation is empowering access to financial education for Alberta's next generation of investment and business leaders.

The Foundation is supporting students at top universities and technical colleges who are pursuing undergraduate and graduate education in a range of business specializations. With awards distributed at six post-secondary institutions to more than 30 students annually, we are committed to developing financial and investing talent from the earliest stages.

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

Funding supports 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

Funding supports 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.

BEYOND THE NUMBERS: FEATURE

Bursaries Help Future Business Leaders Focus on Studies

AIMCo Foundation-funded award supports Kristel Militante as she balances motherhood and pursuing her dream career.



When Kristel Militante was in grade 6, she wrote in her school yearbook that she wanted to be an accountant when she grew up.

Militante has always loved puzzles, problem-solving and even budgeting, so the career choice wasn't a surprise to her family — which includes several accountants among them.

Now a mother of two young children herself, Militante is pursuing the Post-Bachelor Certificate in Accounting from the University of Lethbridge. With support from an AIMCo Foundation bursary, she is one step closer to achieving her childhood career aspiration.

"Financial issues are a burden for most students, so instead of focusing on studying, they're focused on whether they have enough money. This bursary has been really, really helpful for me," says Militante.

Militante is completing her courses at the University of Lethbridge Calgary Campus. With many courses offered in the evening, she can work during the day and take care of her children, while also pursuing her studies.

Militante has already completed an undergraduate degree in her native Philippines. She took a career break when her children were young and moved to Canada in 2023 as an international student. She hopes this certificate will help her on the path of pursuing a Chartered Professional Accountant (CPA) designation.

The AIMCo Foundation scholarship portfolio supports more than 30 students annually at post-secondary institutions from Edmonton to Lethbridge. With an emphasis on financial education across a range of disciplines and degree types, AIMCo Foundation scholarships are empowering Alberta's future leaders in business as they prepare for lifelong careers in fields like finance and investing. Scholarships and bursaries make it possible for students across Alberta to focus on their studies, knowing support is available to help them meet financial obligations like tuition, housing, childcare and more.

OUR CHANGEMAKERS

Corporate Donor Honour Roll

Each year, our corporate partners rally to fund innovative community grants and supportive student scholarships. While our funding distribution is focused in Alberta, we are proud that our list of supporters spans the globe. Knowing the farreaching 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.

Sustainers

Through high-impact multi-year commitments, our **Sustainers** are ensuring the Foundation has stable funding that translates into long-term grant and scholarship agreements for community partners.

Visionaries \$50,000+

Alberta Investment Management Corporation Mawer

Innovators \$25,000 to \$49,999

National Bank of Canada Polar Asset Management

Supporters

Each year, our **Supporters** continue to empower prosperity in Alberta through their annual support of the Foundation's mission and vision.

Champions \$15,000+

Apollo Asset Management LSV Asset Management TD Securities TPG Global Partners \$10,000 to \$14,999

Barings LLC
BlackRock Asset Management
Blackstone
BMO Capital Markets
Christofferson, Robb & Company LLC
CVC Philanthropy
Goldman Sachs & Co LLC
RenaissanceRe

Builders \$5,000 to \$9,999

17Capital
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Wellington Management

Witten LLP

OUR CHANGEMAKERS: FEATURE

Partnering to Move the Needle on Community Financial Empowerment

New multi-year funding commitment paired with financial literacy expertise is a recipe for impact between AIMCo Foundation and National Bank of Canada.



At National Bank of Canada, commitment to women's financial independence goes beyond simply writing cheques to community organizations. It's a deeply embedded corporate purpose that integrates personal finance services with professional expertise and targeted community investment to ensure women across Canada can easily find the information they need to build financial resilience.

In 2024, National Bank continued its commitment to community financial empowerment by pledging \$30,000 over three years in support of the AIMCo Foundation's mission to empower all Albertans toward a secure and prosperous financial future.

"Multi-year support has a unique impact on our mission to empower prosperity by allowing us to provide long-term funding to the agencies making change happen for Albertans," says Shayenne Selleck, executive director of the AlMCo Foundation. "We're immensely grateful to the team at National Bank for recognizing the importance of this work, and are excited for our partnership."

Unexpected Beneficiaries of Financial Empowerment

Women's financial independence is a topic that impacts everyone — including many women financial professionals who spend their days researching and investing on behalf of others while being under-involved in their personal household financial planning.

This message was reinforced on International Women's Day in 2024 with National Bank's expertise front and centre. AIMCo's Women and Allies for Gender Equity employee resource group hosted a virtual event in partnership with National Bank and the AIMCo Foundation to bring attention to a topic often considered taboo in Canada, especially among finance professionals.

Keynote speaker Vanessa Stockbrugger, Regional Vice-President – Wealth, Western Canada, Private Banking 1859, National Bank, has spent much of her career working on

financial planning with women and families. She engaged AIMCo colleagues in a discussion about why women face barriers to financial independence and provided tactical ways women can take charge of their financial futures, as well as how men can be allies in this space.

"Financial empowerment starts with awareness and grows through action. At National Bank, we believe in equipping women with the tools, knowledge, and confidence to take control of their financial futures," says Stockbrugger. "It was an honour to speak with AIMCo colleagues and help spark conversations that can lead to lasting change — not just for individuals, but for families and communities as well."

"Vanessa's expertise and experience made people feel comfortable sharing their financial stories and questions, which is not an easy thing to do when discussing personal finance," says Selleck. "The conversation was really just the beginning and we're so grateful to National Bank for investing in women's financial independence through both their financial support of the Foundation, as well as the resources they provide and the work they do every day."

In 2024, corporate partners from across Canada and around the world contributed more than \$400,000 to advance financial literacy and education in Alberta. Multi-year sustainable funding like that provided by National Bank of Canada allows the AlMCo Foundation to deliver meaningful, year-over-year grants and scholarships that ensure beneficiaries are receiving continued support to meet their financial empowerment needs at different stages in their lives.

OUR CHANGEMAKERS

Volunteer Honour Roll

In 2024, more than 60 colleagues representing AIMCo's clients and corporate divisions volunteered their time and talent in service of Albertans to advance the governance, strategy and operations of the AIMCo Foundation.

From raising critical funds through fundraising events and corporate partnerships to coordinating funding distribution to post-secondary institutions and community organizations across our province, these passionate volunteers move us closer every day to a world in which all Albertans have a secure and prosperous financial future.

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Volunteers Fuel Growth and Impact in Financial Empowerment

Sheri Wright, long-time AIMCo Foundation volunteer, reflects on the organization's journey.



In 2018, Sheri Wright was in a unique position to see how everyone from teenagers to seniors can benefit from financial literacy education. As a public school trustee and an executive at a pension plan, she saw both students who needed to learn more about long-term savings and seniors who struggled to understand their pension statements.

So, when the AIMCo Foundation for Financial Education was founded that year with a vision of creating a secure and prosperous financial future for all Albertans, Wright was keen to join. She became a founding member of the Board of Directors, serving until her retirement in 2024. During her tenure, Wright saw the Foundation grow from an upstart endeavour to a registered charity that has distributed more than \$2 million in Alberta through grants and scholarships.

"I'm so very proud of the work the Foundation has done, and I think it's an organization that is going to hold its own for generations to come," she said.

The AIMCo Foundation is driven by volunteers who are staff or clients of the Alberta Investment Management Corporation (AIMCo). Wright volunteered when she was an employee at the Local Authorities Pension Plan and later the Special Forces Pension Plan, both AIMCo clients. As the board's client representative for more than five years, Wright played a critical role in ensuring the Foundation considered AIMCo client perspectives throughout its growth, and that clients remained aware of the good work happening on the ground through the Foundation's community partnerships.

In the beginning, Wright saw an organization that was powered by good people with great ideas. Fundraising efforts were grassroots and included campaigns like "Jeans Week," where AIMCo employees could wear jeans to work in return for donations. Over time, the Foundation grew into a sophisticated charity that has scaled its impact by leveraging wider fundraising campaigns and donations from AIMCo's corporate partners.

Unlike many corporate foundations funded exclusively by a corporate budget line from a parent company, the AIMCo Foundation is an independent registered charity funded primarily by employee donations and corporate partner fundraising, and is governed by a separate Board of Directors.

"The Foundation had humble beginnings. There were just a few people who were doing the work off the sides of their desks, but who saw the dream of what it could be. It's now an amazing, professional charitable organization. It's been very meaningful for me to be part of it," Wright says.

Over the years, Wright has been impressed by the variety of Alberta charities that have delivered financial education programs thanks to grants from the AIMCo Foundation. These include organizations like the Bissell Centre in Edmonton, which works with very low-income populations, and Wellspring Alberta, which helps people navigate the financial impacts of a cancer diagnosis.

"These agencies are doing very impressive work, using these dollars to make an impact and to serve people from all backgrounds throughout Alberta. It's amazing to see the work that's being done."

The AIMCo Foundation is powered by people. From the oversight and strategic direction provided by a volunteer Board of Directors and Steering Committee to the completion of core operational functions like accounting, fundraising and funding recommendations, the Foundation's volunteers are moving our mission forward every day. Their commitment and passion ensure financial education is accessible across Alberta, through impactful community grants and supportive student scholarships.

Thank you for empowering access.

Your support is changing the lives of Albertans through innovative community grants and impactful student scholarships. Your generosity is profoundly appreciated not only by the AIMCo Foundation, but also by our community partners and the people they serve.

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

