

2023

Annual Giving Report



Western
FINANCIAL GROUP
Communities Foundation



Western Financial Group is headquartered in High River, Alberta. Alberta is the traditional and ancestral territory of many peoples, presently subject to Treaties 6, 7, and 8. Namely: The Blackfoot Confederacy – Kainai, Piikani, and Siksika – the Cree, Dene, Saulteaux, Nakota Sioux, Stoney Nakoda, and the Tsuu T’ina Nation and the Métis People of Alberta.

We respect the treaties made on these territories, acknowledge the harms and mistakes of the past, and dedicate ourselves to moving forward in partnership with Indigenous communities in the spirit of reconciliation and collaboration.

Our Mission

Because we care, we support causes that matter most to our customers, people and the diverse communities we serve.

Our Purpose

Giving back is in our DNA. We are committed to partnering with our team members and business partners to build strong and vibrant communities in Canada.

2023 Reflections

As I reflect on the past year, I'm in awe at the displays of resilience by our local communities and dedicated teams in the face of many challenges. Community is at the heart of everything we do, and care guides all our actions. I am immensely proud to share stories from our community support efforts in 2023 through the Western Communities Foundation, the charitable arm of Western Financial Group. Despite the numerous challenges we faced with the onslaught of catastrophic events and natural disasters across the country, our community came together in remarkable displays of resilience and strength, giving back over \$600,000 to the communities where we live and work.

In response to the wildfires and flooding across Canada, our collective efforts with local community partners demonstrated unwavering commitments to being there when our communities needed us the most. From ensuring our colleagues in affected areas were safe and accounted for to caring for our customers, the Western Communities Foundation donated \$25,000 to the Red Cross British Columbia Wildfires Appeal and the Nova Scotia and Atlantic Canada Appeal through our Emergency Support Fund. Together with local community members, our collective spirit and determination have shown us that even in the face of adversity, we can strengthen the communities where we live and work.

In the past year, we've supported 135 exceptional students, including 19 Indigenous students, through our Inspirational Bursary Award program. These awards empower our students to pursue their post-secondary goals, overcoming personal challenges along the way.

The Western Communities Foundation, our team members, and our business partners have been key in positively impacting local communities for 23 years. By actively raising funds for causes that are important to our people, and customers, we have collectively raised \$200,000 to fund 40 Infrastructure Grants. These grants support community enhancement projects that promote resilience, social belonging, safety, and sustainability. Five of these grants were awarded to Indigenous communities, honouring and preserving their rich cultural heritage and resilience. As we enter another year of service, we are reminded that our work is not done in isolation but in partnership with each of you. To our donors, community partners, and team members—thank you for your support. Your involvement sparks positive change in our communities. With your help, the Communities Foundation celebrates 23 years of empowering change in our communities from coast to coast.

Warm regards,

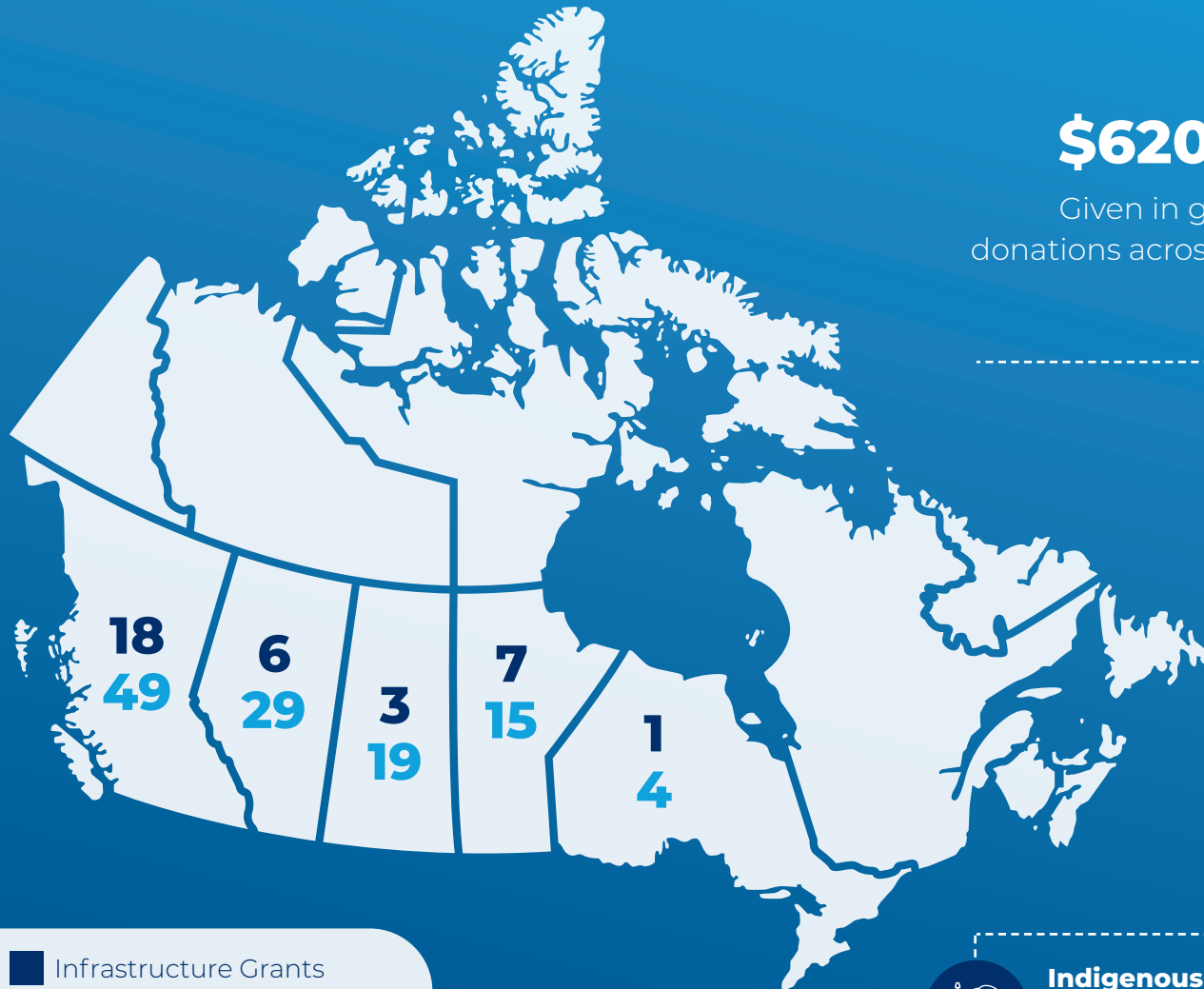


Kenny Nicholls
Chair of the Board



2023 Giving in Action

Together with our supporters, we are helping to enable positive change from coast to coast.



\$620,499

Given in grants and donations across Canada.

■ Infrastructure Grants
■ Inspirational Awards



Indigenous

5 Infrastructure Grants
19 Inspirational Awards

\$200,000

In **Infrastructure Grants** awarded to support **community enhancement projects** that build strong, vibrant and inclusive communities.

135

High school students honoured with the **Inspirational Bursary Awards** for their remarkable resilience, determination, and personal growth in the face of adversity.

200+

local charities and organizations **benefited**.

Supporting Communities Through Disaster

In the summer of 2023, wildfires devastated our communities in Central British Columbia, Alberta and the Northwest Territories. Despite the significant loss, our communities' resilience shone through. Teams from all areas of Western Financial Group rallied together to support each other and our customers as evacuation orders were issued for over 155,00 residents.

Despite the unfolding natural disaster, our teams went above and beyond the call of duty to support their neighbours, from volunteering their time to help with clean-up efforts to offering their homes as temporary shelters. Our teams demonstrated care for their communities by working tirelessly to provide efficient and compassionate insurance services to assist those affected by the fires.



“

It's been a rollercoaster here, and I appreciate your calm, compassionate assistance this morning. ”

– Customer impacted from the West Kelowna wildfires

Through the Western Communities Foundation, Western Financial Group donated \$10,000 to the Red Cross British Columbia Fires Appeal Fund, which was used for immediate and ongoing relief and recovery efforts.

Our teams provided more than just insurance services; they went the extra mile to show our communities how much we care. Notably, during the fires in Kelowna, the Fire Department needed essential services like water, Gatorade and snacks. On behalf of the entire Kelowna team, Kyle Giesbrecht, manager of the Rutland Branch, stepped up and delivered a carload of essentials to the Fire Department.

“

The character and unity of Western Financial Group shine brightest in times of crisis. ”

– Grant Ostir, Chief Growth Officer

\$25,000

Donated for disasters and emergency relief to help communities most impacted by the Nova Scotia floods and British Columbia wildfires.





\$200,000 total invested in 2023.

40 community projects supported.

5 Indigenous communities benefited.

Building Communities one grant at a time

Each year, the Western Communities Foundation awards Community Infrastructure Grants to support and invest in enhancing, upgrading, and constructing community spaces and assets across Canada, including in Indigenous communities. These projects benefit the community's future by contributing to its strength and resilience, enhancing sustainability, accessibility, health and safety, and creating connections and a sense of belonging to allow our communities to flourish.

Grant Recipients Spotlight

Langley Child & Youth Advocacy Centre (CYAC) Langley, British Columbia

Today, one out of three children experience some form of abuse in British Columbia, only a small number of victims report their abuse, and even fewer receive the care and support they need to heal. The creation of a new Langley Child & Youth Advocacy Centre (CYAC) will offer collaborative services in response to child abuse and crimes against children and youth, as well as support for their non-offending caregivers, helping to fill a crucial gap in service in the community. The centre connects children, youth, and their families to tailored services, helping them navigate medical, criminal justice, and child protection systems—all within a safe space, under one roof. By assigning a dedicated professional to support families from disclosure to court outcomes, the Centre minimizes the need for re-telling stories and re-traumatization for victims.



“

We deeply appreciate the generosity of our community members who are committed to helping children and youth in Langley recover and heal from the emotional and psychological impacts of violence and abuse. The creation of a new CYAC in Langley will go a long way to ending the cycle of violence and showing our children and youth the respect, dignity and support they need and deserve.

”

– Heather Scott, Executive Director, Langley Community Health & Hospital Foundation

! **600**

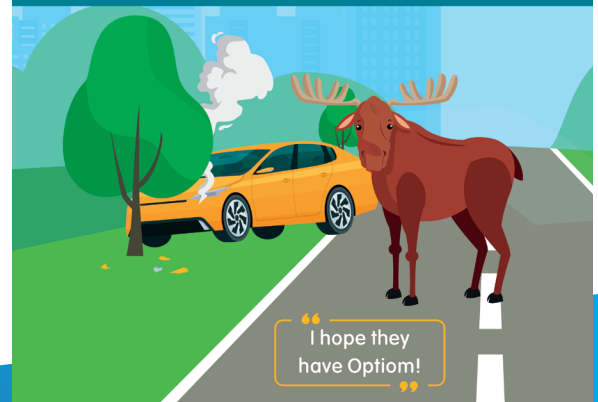
Children and youth to be impacted annually from the establishment of a CYAC, filling a crucial gap in the system.

The Western Infrastructure Grant will help enable the Centre to provide children and families with timely access to health and mental health services and reduce hospital visits and long-term impacts of trauma.

This Infrastructure Grant was made possible thanks to the generous sponsorship of Optiom Inc. For more information on Langley's CYAC, visit lchhfoundation.com/langley-cyac

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École Salisbury Morse Place School Winnipeg, Manitoba

From the seeds of an idea sparked in 2019, the École Salisbury Morse Place School team embarked on a journey to transform their playground. The need was clear: their diverse student body, including those with disabilities, deserved a new play structure and green space where everyone could play together. The existing play structure, surrounded by unforgiving railway ties and pea gravel, posed barriers for wheelchair users and walkers alike.

They have developed a three-phased plan through thoughtful design. The first phase includes building a play area that ensures accessibility for everyone. This area will have a rubberized surface and equipment at ground level, allowing children and people of all abilities to play and move comfortably.

Learn more about Infrastructure Grants at westerngives.ca

! Nearly 700

Children and individuals will be impacted so that children of all abilities can participate in play.

“

We are seeing the bank balance grow, which means we are getting closer to our target goal of \$400,000! We still have a long way to go, but we are confident we will get there. Thanks very much to generous offers like the one from Western Financial Group.

”

– Niki Gagnon, teacher

They stole our whole inventory!!! They even took our stapler!

Are we covered?



Just say the word

Wawanesa

This Infrastructure Grant was made possible thanks to the generous sponsorship of Wawanesa Insurance.



Celebrating our Resilient Future Leaders

In 2023, Western Financial Group supported 135 high school students who demonstrated resilience to overcome adversity, financial hardships, and challenges. Despite facing obstacles such as mental health issues, physical disabilities, or personal and family problems, these students displayed remarkable determination and courage to graduate and pursue their post-secondary education. We celebrated their outstanding achievements with the Western Inspirational Bursary Award, recognizing and encouraging them to strive for even greater success and inspiring others to do the same.

\$100,000+ bursaries awarded in 2023.

135 high school students.

19 Indigenous students.

Award Recipient Spotlight

Emma Lyttle
Kingston, Ontario

Way to go, Emma!

Emma's path to higher education has been marked by resilience, leadership, and unwavering determination. As a child of a parent in the Canadian Forces, Emma navigated moving across Ontario and Manitoba every few years, changing schools and making new friends while still excelling in school due to her incredible work ethic.

Since attending Valour School in September 2021, Emma has consistently achieved Gold Honour Roll status every semester. Notably, she has fulfilled the requirements of the Sports Specialist High School Major program, paving the way for her to receive an enhanced Ontario Secondary School Diploma upon graduation. She has also been honoured with the Renfrew County District School Board Medallion for her academic success in grade 11 and again in grade 12.

“
Receiving the Western Inspirational Award allowed me the opportunity to spend my first semester of university abroad in England. I've spent most of my life moving across Canada as a military child, and this Bursary Award has allowed me to continue learning about new people and places.
”

– Emma Lyttle

Emma's achievements and dedication are inspiring. She lost her father to cancer in May 2021. Her family moved across the country to be closer to their extended family, which meant that Emma had to adapt to a new school district in a new province during her final years of high school. Despite this, she graduated from high school as valedictorian and completed her first year at Queen's University in the United Kingdom with a 4.1 GPA as she pursues her Bachelor of Science (Honours) with a major in Mathematics and Statistics. She aspires to attend the Royal Military College of Canada in Kingston to join the Canadian Armed Forces in the future.



Demonstrating Care through Employee Giving and Volunteerism

In 2023, our Western Financial Group team demonstrated our collective care and dedication to community service and volunteerism. From natural disasters to economic uncertainties, our team members across Canada were at the forefront of donating time and resources to support those in need. Their efforts made a meaningful impact on many lives across the more than 150 communities where we operate. Here are some highlights of how our team in Manitoba exemplifies Western's culture of care and dedication during this challenging year.

\$147,000

donated from funds raised by employees.

116

local causes supported.

1,290+

total employee volunteer hours.

\$34,800¹

economic value generated through volunteerism.

Regional Spotlight: Manitoba

Community Support in Action

Our Gilbert Plains office raised nearly \$2,500 through annual events and fundraising activities for the local elementary school's "Parents as Partners in Literacy" project.

When the Dauphin Seniors bus crash occurred, our team in Gilbert Plains didn't hesitate to step up. They donated \$10,000 on behalf of Western Financial Group to the Dauphin and District Community Foundations' Support our Seniors fund, a direct and significant contribution to the recovery efforts. They also donated \$7,000 to support the Gilbert Plains Fire Department and other community projects, demonstrating their commitment to the community.

In Souris and Brandon, Manitoba, our teams embraced community support during the holidays by collecting and donating food to local projects, such as Bear Clan, the Women's Resource Centre, the Samaritan House, and more.

Embracing Giving and Volunteerism

In 2023, our Brandon, Manitoba team raised \$3,270 for the Blue Door Project to support children, youth, adults and families experiencing homelessness and donated \$4,800 to the United Way, with \$2,800 contributed from team members.

Our Winnipeg branches also collected 70 pounds of food donations for the Transcona Food Bank and over 1,000 pairs of socks for the Main Street Project. They were actively involved in various community projects and volunteer programs throughout the city, such as Habitat for Humanity, the Blue Door Project, the Ronald McDonald House Home for Dinner program, and Winnipeg Harvest.

¹-Based on a study by The Conference Board of Canada, the economic value of volunteering is measured as the average hourly wage in the core nonprofit sector. In 2023, this wage was \$27 per hour as reported by Talent.com.



National Walk to Support the Cause

Since 2005, Western Financial Group, through its Communities Foundation, has been organizing a 5km National Walk to raise funds for local communities from coast to coast. In 2023, over 1,600 team members in more than 150 Canadian communities sported their blue Western t-shirts, walking alongside local business and community partners, neighbours and friends to show their support and raise funds for charities that are meaningful to them. Thanks to the generosity of our team members and supporters, we donated over \$80,000! These funds have made a tangible impact, supporting more than 100 local causes across Canada, as selected by our team members.



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Western Communities Foundation Annual Golf Classic

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The Western Charity Golf Classic has been a valued tradition for the past twenty years. Bringing together over 200 team members, friends, and business partners, the annual golf tournament supports the Western Communities Foundation and has been instrumental in raising funds for local communities.

The 2023 Charity Golf Classic, held at the Highwood Golf & Country Club, was a resounding success. This event, which combined a day of golf with a good cause, saw a great response from our sponsors, team members, and supporters. A total of 152 golfers registered for a day of friendly competition and community support. Thanks to their enthusiasm and generosity, we raised over \$67,000 for the Foundation's programs and initiatives.

Thank You Sponsors

Your support help us make meaningful impacts in communities.

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Since 2001, the Western Communities Foundation has invested more than **\$9 million** into communities, funding **over 400 community projects** and more than **1,750 students**.

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