

# 2024 Reconciliation Action Plan

**IGM** Financial Wealth Management  
Asset Management



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# Reconciliation Action Plan

## Forward

IGM Financial Inc. is pleased to advance our first Reconciliation Action Plan, which demonstrates our commitment to the Truth and Reconciliation Commission's Calls to Action and proposes various ways that we will work with Indigenous Peoples and communities to develop partnerships and collaborations, prosperity and inclusion.

In Indigenous communities, prosperity is closely associated with well-being and a desire to forge better lives today and for the generations to follow. Our decision to develop this Reconciliation Action Plan is premised on our belief that as a non-Indigenous organization, we have a role to play in reconciliation. Through the implementation of this Reconciliation Action Plan, we are embarking on a journey that will see IGM take concrete steps toward ensuring that Indigenous Peoples have more and better socio-economic opportunities in the future.

Our Reconciliation Action Plan is envisioned as a living document. Periodically, we'll assess our progress and adapt the plan accordingly. In that spirit, this Reconciliation Action Plan is a public acknowledgement and commitment on behalf of IGM to grow our relationships with Indigenous Peoples and communities, and to jointly identify and co-design pathways to build and grow Indigenous partnerships, prosperity and inclusion.

This is not a journey we take alone, and we will continue to seek guidance and wisdom. With our endorsement of the Truth and Reconciliation Commission's Reconciliation Calls to Action and as signatories of the Winnipeg Indigenous Accord, we will continue to invest in opportunities to move our company and our people towards greater understanding, awareness and action.

**This document features artistic elements from Cree visual artist and graphic designer, Jordan Stranger. You can read more about Jordan and his commitment to life, culture and acceptance on page 12.**

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# Land acknowledgement

**We acknowledge that IG Wealth Management's and IGM Financial's head offices are located on Treaty One Territory, the traditional lands of the Anishinaabe (Ojibwe), Dene, Dakota, Inuk, Anishinini and Ininew peoples, as well as the Homeland of the Red River Métis.**

**We also acknowledge that Mackenzie's head office is situated on the traditional territories of the Mississaugas of the Credit, Chippewa, Anishnabeg, Haudenosaunee and Wendat Indigenous Peoples.**

**Our Montreal offices are located on the traditional territory of the Kanien'kehá: ka Nation, or Mohawk.**

**We respect the continued connections with the past, present and future in our ongoing relationships with Indigenous and non-Indigenous Peoples within these lands, and are grateful to have the opportunity to work in these communities.**

**IGM Financial acknowledges the unique heritage, diverse cultures and outstanding contributions of First Nations, Inuit and Métis Peoples and furthers its commitment toward making progress on reconciliation.**

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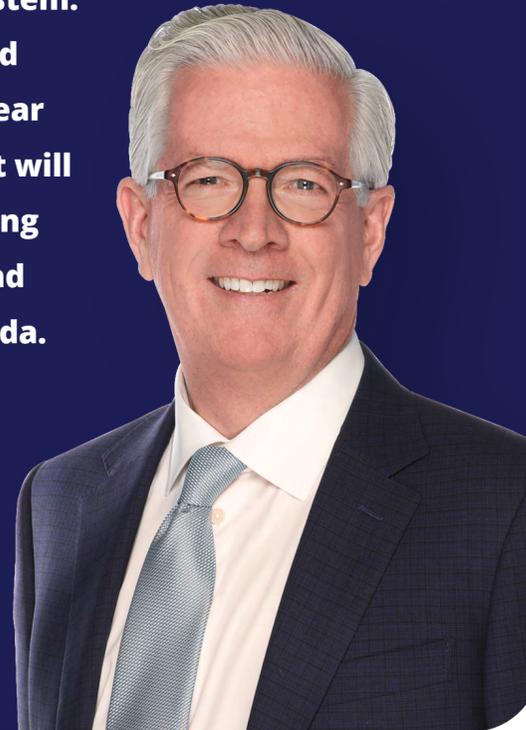
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**We understand that reconciliation requires acknowledging the history and present-day barriers faced by Indigenous Peoples in Canada, including systemic racism and the continued impact of the residential school system.**

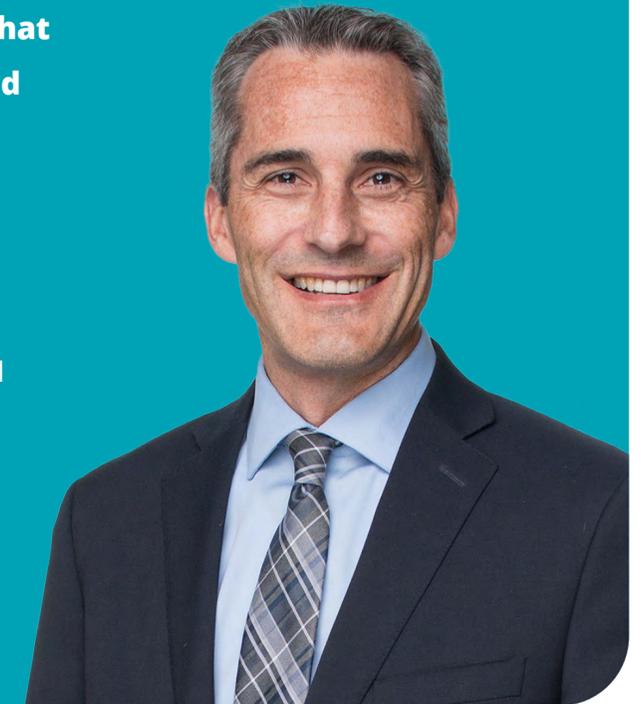
**IGM Financial has formally launched a reconciliation framework with clear and measurable commitments that will accelerate progress while responding to Call to Action #92 of the Truth and Reconciliation Commission of Canada.**

**James O'Sullivan,**  
President and  
Chief Executive Officer, IGM Financial



**I am proud to serve as an Executive sponsor of IGM's Indigenous Business Resource Group. It is one of the ways I can continue to learn and influence positive change in our company. We are committed to creating an environment that fosters true reconciliation and economic prosperity for Indigenous communities.**

**Keith Potter,**  
Executive Vice-President and  
Chief Financial Officer, IGM Financial



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# Corporate Canada's call to action: business and reconciliation

In 2015, the Truth and Reconciliation Commission of Canada (TRC) issued its final report in collaboration with Indigenous and non-Indigenous communities that outlines **94 recommendations towards reconciliation**. Action 92, titled "Business and reconciliation", calls upon corporate Canada to adopt the United Nations Declaration on the Rights of Indigenous Peoples and asks for meaningful consultation, long-term opportunities and the education of both management and staff on the history of Indigenous People.

These three important actions are outlined below. IGM Financial is committed to creating a workplace where all our employees — including First Nation, Métis and Inuit — can contribute to their fullest potential. As a Canadian company, IGM Financial has a responsibility to participate in the process of reconciliation between Indigenous and non-Indigenous Peoples. Reconciliation is a crucial step towards healing the negative impacts caused by colonialism. The following Reconciliation Action Plan will detail how IGM Financial is proudly responding to the call.

**#92. We call upon the corporate sector in Canada to adopt the United Nations Declaration on the Rights of Indigenous Peoples as a reconciliation framework and to apply its principles, norms and standards to corporate policy and core operational activities involving Indigenous Peoples and their lands and resources. This would include, but not be limited to, the following:**

- 1. Commit to meaningful consultation, building respectful relationships, and obtaining the free, prior, and informed consent of Indigenous Peoples before proceeding with economic development projects.*
- 2. Ensure that Aboriginal peoples have equitable access to jobs, training and education opportunities in the corporate sector, and that Aboriginal communities gain long-term sustainable benefits from economic development projects.*
- 3. Provide education for management and staff on the history of Aboriginal peoples, including the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaties and Aboriginal rights, Indigenous law, and Aboriginal-Crown relations. This will require skills-based training in intercultural competency, conflict resolution, human rights and anti-racism.*

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# The journey ahead

IGM has established the following goals and activities using the underlying principle of building meaningful relationships with Indigenous communities, organizations, and businesses, that benefit our Indigenous partners, create trust and drive positive impact. Our overarching goal is to implement this action plan in ways that contribute to economic reconciliation.

## IGM's Reconciliation Action Plan goals

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# Grow Indigenous prosperity:

IGM Financial is committed to growing its Indigenous partner network and ecosystem. The partner network will be IGM's clearest expression of the relationships it has developed with Indigenous Peoples. Partnerships have been and will continue to be established to collaborate directly with Indigenous communities and support their employment, community investment and well-being.

## GOAL 1:

Establish partnerships that support economic empowerment in Indigenous communities.

## GOAL 2:

Increase access to educational opportunities for Indigenous youth and invest in mentoring and scholarships to provide students with long-term support.



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# Grow Indigenous prosperity:

## GOAL 3:

Partner with Indigenous communities to increase wealth creation opportunities.

## GOAL 4:

Create a safe and respectful working environment that fosters the retention and advancement of IGM's Indigenous employees, grounded in Indigenous experiences.



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# Drive Indigenous inclusion:

Creating a workplace where all our employees can contribute to their fullest potential starts with fostering an inclusive culture that celebrates and honours the history of Indigenous People. IGM Financial is committed to providing regular and progressive education to its employees and Advisor networks to expand their knowledge of Indigenous history, culture and the current socio-economic Indigenous landscape.

## GOAL 5:

Prioritize Indigenous-led education and training focused on cultural competency, historical experiences, and contemporary issues.

## GOAL 6:

Collaborate with educational institutions and Indigenous employment agencies to grow our Indigenous recruitment and retention program.



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# Principles

**IGM's Reconciliation Action Plan is guided by principles that inform the direction and outcomes our company wants to develop and achieve with Indigenous Peoples, organizations and communities.**

IGM recognizes the importance of the TRC Calls to Action, which seek to engage Canada's leading institutions, agencies and organizations in the development of new relationships and opportunities with Indigenous Peoples. IGM joins governments, the judicial system, educational institutions, religious organizations and other businesses in the private sector to do our part toward working with First Nations, Métis and Inuit to build a better, more inclusive future.

IGM is aware that the cornerstone of strong and sustainable relationships is trust. We know that building trust requires respect, humility, transparency and accountability. IGM commits to continue building – through meaningful and sustained engagement – our respect for Indigenous culture and values. From the knowledge and guidance we gain throughout our engagement processes, we will continue to develop policies, programs and actions that address needs identified by the Indigenous community. We will stand by our commitments and commit to openly sharing our progress.



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# A creative vision bringing our commitments to life

**Through pencil, paint or digital mediums, Jordan Stranger communicates the importance of life, culture and acceptance.**

His works are deeply rooted in the traditions within contemporary Indigenous culture. As a Cree individual originally from Peguis First Nation, Jordan uses his life experiences and spiritual practice learned through Ojibwe teachings to drive his artistic passions. He obtained his diploma in Graphic Design at Red River College in 2012 and had worked in advertising for almost a decade selling and pitching campaigns to thousands of clients.

Today he continues his work as a full-time self-employed visual artist and graphic designer operating under his own brand, Totem Doodem. Over the last few years he has held several art exhibitions in Manitoba and has participated in cultural events in Toronto and Oaxaca. He also currently sits on the board of directors at Artspace Inc.

**Visit [jordan stranger \(myportfolio.com\)](https://myportfolio.com) to learn more about Jordan and Totem Doodem.**



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# Our progress so far

## Grow Indigenous prosperity

External partnerships are vital for accelerating our reconciliation journey. We have both long-standing and new partners that are Indigenous-led as well as related non-Indigenous agencies, that help guide our strategy, reinforce the transformative work we're looking to tackle, and contribute to driving DE&I more broadly within our organization, industry and communities. IGM will continue to work with these organizations to identify key contacts within communities and gain valuable introductions. We will grow our partnership network in a measured way to ensure that key relationships are given the energy they deserve.



In 2021, IG Wealth Management and Power Corporation of Canada announced a partnership with the National Centre for Truth and Reconciliation (NCTR). Together, NCTR with its partners, including IGM, have been building and conducting their "Imagine a Canada" program. This national art and leadership program inspires youth to envision reconciliation and is a component of the IG Empower Your Tomorrow \$5 million commitment to support Indigenous communities across Canada over the next five years.

As a member of the Canadian Council for Indigenous Business (CCIB), IGM supports bridge-building between Indigenous and non-Indigenous Peoples, businesses and communities through diverse programming, tools, training, network building, major business awards and national events. IGM sees opportunities to collaborate with CCIB in deeper ways in the future.

In 2024, IGM formalized a partnership with AMIK. AMIK supports Indigenous People's access to employment opportunities and helps employers recruit and retain an Indigenous workforce.

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# Our progress so far

## Grow Indigenous prosperity

Supporting Indigenous communities remains a strong focus for IGM. In partnership with Prosper Canada and delivered through its network of community agencies, IGM offers financial empowerment programming to First Nations communities in Ontario and Manitoba. IGM provided funding through its **"Empower Your Tomorrow Indigenous Commitment"** philanthropy program. This was a two-year pilot program that ended in 2023 and was subsequently extended to 2025.

To date, as reported in *"Building Financial Wellness in First Nation Communities Year Two Report (2021 – 2023)"*, the program has demonstrated success. Other successes include the delivery of financial literacy workshops and attendance by over 5,000 community members and \$8,150,000 in income that was returned to community members through 2,668 tax filings.



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# Our progress so far

## Grow Indigenous prosperity

IGM has been increasing its efforts to build strong relationships with universities and colleges with engaged Indigenous populations and having strong links to the Indigenous community. We are putting more emphasis on the development of partnerships with Indigenous educational institutions: IGM has been continuously growing campus recruitment initiatives by establishing employment partnerships with key post-secondary institutions that have strong Indigenous enrollment.

IGM has partnered with Red River College (RRC) Polytechnic (Manitoba's largest institute of applied learning and research) in a multi-year commitment of \$225,000 per year to develop the **IG Wealth Management Empower Your Tomorrow Scholarship and Mentorship Program** for post-secondary Indigenous students. This partnership aims to enhance the capacity of Indigenous students, ensuring not just successful graduates but leaders poised to excel in their chosen careers. IGM's support will reduce barriers students face through guidance and financial assistance. The program will focus on the development of leadership, academic and employment skills.

### IG Wealth Management Empower Your Tomorrow at RRC Polytech

This program involves supporting the academic journey of up to 10 Indigenous students a year. It includes tuition support, assigned mentors from IG Wealth Management and summer employment or internships.

### New Navigation Coach

Through IG funding, RRC will hire a Navigation Coach dedicated to supporting over 1,200 Indigenous students over four years in the following program areas: business administration, creative arts, computer and information systems technology, and hospitality and tourism.

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## Grow Indigenous prosperity

IGM has also partnered with **Pathways to Education** and the **Community Education Development Association (CEDA)**, a Winnipeg-based organization that promotes education to create opportunities for growth, knowledge and freedom among underserved youth.



This programming will be delivered in the following Winnipeg neighbourhoods: Lord Selkirk Park, William Whyte, Dufferin and North Point Douglas. For \$225,000 per year, IGM's support will provide academic, financial, social and one-on-one support to 675 high school students (over three years) living in historically low-income, high-risk neighbourhoods in Winnipeg to help them reach graduation and prepare for life beyond high school. This program will include mentorship opportunities with company employees and Advisors. Before the Pathways Program was introduced in Winnipeg, the graduation rate amongst the targeted communities was just 28%. In the 2022-2023 school year, 60% of students enrolled in the program graduated from high school.

**\$225K** annual support

**675** high school students

pre-program graduation rate in Winnipeg **28%**

2022-2023 program participant graduation rate **60%**

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# Our progress so far

## Grow Indigenous prosperity

Following the announcement of a pilot by the Aboriginal Financial Officers Association of Alberta (AFOA Alberta), CPA Western School of Business and CPA Canada to address systemic barriers and increase Indigenous representation in accounting, IGM, through the IG Wealth Management CPA Training program, has undertaken an Indigenous stream pilot within our existing CPA training program.

The pilot considers the unique needs of this underrepresented group, as well as the barriers to entry faced in pursuing a CPA designation, and looks to provide development opportunities and support to Indigenous learners on the CPA path. A pilot group of four individuals, including both inter (term) and full-time roles began in May 2024.



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# Our progress so far

## Drive Indigenous inclusion

The **Indigenous Business Resource (BRG)** supports and strengthens IGM's commitment to truth and reconciliation. The BRG, made up of Indigenous employees, advisors and allies, works to increase knowledge and respect of Indigenous culture and history, to promote conversations and to inspire meaningful and collaborative action in our community of employees, advisors and clients.

IGM Financial is committed to creating a workplace where all our employees — including First Nation, Metis and Inuit — can contribute to their fullest potential. The Indigenous BRG works to increase knowledge and respect of Indigenous culture and history, to promote conversations and to inspire meaningful action in our community of employees, advisors and clients. IGM Financial has a responsibility to participate in the process of reconciliation of relations between Indigenous and non-Indigenous Peoples and the Indigenous BRG stands to support and strengthen IGM's commitment to truth and reconciliation. We continue to invest in opportunities to move our company and our people toward greater understanding, awareness and positive action.



The **Gord Downie and Chanie Wenjack Fund (DWF)** provides access to education on the true history of Indigenous People in Canada and the history and legacy of residential schools, and encourages reconciliation by way of programming and events. The **reconciliACTION** work of the DWF and its partners, like IGM, is contributing to the shift in the collective consciousness of all peoples in Canada, including IGM staff, and improving the lives of Indigenous Peoples.

In addition to taking full advantage of the DWF education, programs and events, IGM has also established legacy rooms or spaces in its corporate offices. Legacy spaces are safe, welcoming places where conversations and education about Indigenous history — and our collective journey towards reconciliation — are encouraged and supported. They also serve as symbols and reminders of the important work each of us needs to undertake to fulfill the Truth and Reconciliation Commission's calls to action.

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## Drive Indigenous inclusion

IGM will continue to encourage employees to complete the **Four Seasons of Reconciliation course**. IGM will continue to provide education for management and staff on the history of Aboriginal peoples, including the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaty and Aboriginal rights, Indigenous law, and Indigenous-Crown relations.

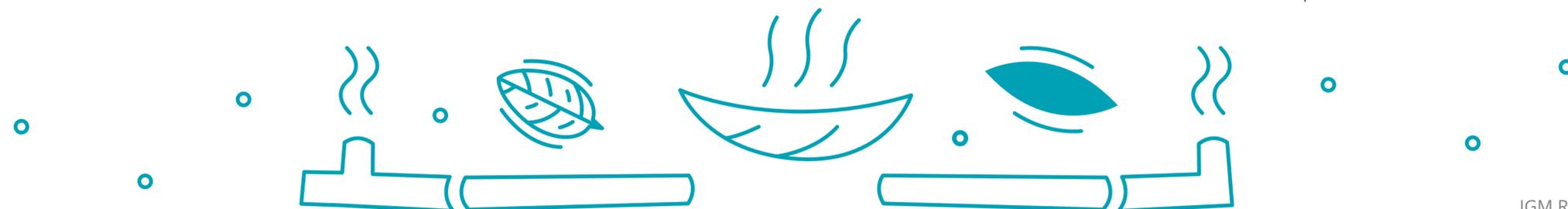
### **4 Seasons of Reconciliation**

IGM will continue to provide blanket exercise opportunities in all our corporate offices, reflecting regional, cultural and ceremonial differences.

Recognized as an act of reconciliation, IGM will continue to offer land acknowledgement training that supports the personalization of such statements. Partnering with our Indigenous BRG, land acknowledgements are developed and made available for all our corporate and field offices, recognizing these will vary from office to office across the country.

IGM will continue to recognize Indigenous Peoples Day (June 21) and Truth and Reconciliation Day, or Orange Shirt Day (September 30), by offering special commemorative events and activities, but is fully cognizant that Indigenous awareness must become an integral part of our corporate culture and values, every day of every year. To support our learning journey, we have been honoured to welcome several Indigenous leaders into our organization, including Phil Fontaine, an activist and well-respected advisor on Indigenous relations and a former National Chief of the Assembly of First Nations, and Dr. Niigaan Sinclair, an Anishinaabe writer, editor and activist, and a professor at the University of Manitoba.

In addition, to support our progress and stated goals, we have established targets (key performance indicators or KPIs) that are tied to compensation for the CEOs and the CEOs' direct reports. Our targets focus on underrepresented employees, with annual milestones set to reach our diversity and inclusion goals in Canada within the next four years. We have established goals to increase our representation of Indigenous employees and increase access to internships.



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IGM will continue to evolve our Reconciliation Action Plan toward our goals of partnerships and collaborations, prosperity, and inclusion. We will monitor our progress towards specific goals through IGM's annual Sustainability Report, which aligns to the commitments made in this document.

As a next step, IGM will develop an Indigenous relations strategy that will guide our governance, policies and procedures, relationship-building and day-to-day activities. We will deepen our accountability framework to further elevate our company's Indigenous-related goals and activities. One of the most important elements of our reconciliACTION plan is the transparency of our progress and ongoing challenges. Through IGM's annual Sustainability Report, we will measure our progress quantitatively and qualitatively.

## About our Reconciliation Action Plan

**For more information on the success metrics of this plan, please visit [Corporate sustainability](#).**

IGM is aware that the goals and commitments that are made in this plan, as it evolves over time, will require adequate resources to be sustainable and effective over the long term, and this plan will be executed throughout every corner of our company. Every board director, employee, field Advisor and supplier will see the opportunities that are available to enrich our corporate culture by increasing Indigenous inclusiveness and awareness. We will embrace our responsibilities in the spirit of reconciliation and a desire to work closely with Indigenous Peoples, businesses and communities.

Forward-looking statement

Certain statements in this report, other than statements of historical fact, are forward-looking statements based on certain assumptions and reflect IGM Financial Inc.'s (IGM Financial, IGM or the company) current expectations. Forward-looking statements are provided to assist the reader in understanding the Company's financial position and results of operations as at and for the periods ended on certain dates and to present information about management's current expectations and plans relating to the future. Readers are cautioned that such statements may not be appropriate for other purposes. These statements may include, without limitation, statements regarding the operations, business, financial condition, expected financial results, performance, prospects, opportunities, priorities, targets, goals, ongoing objectives, strategies and outlook of the Company, as well as the outlook for North American and international economies, for the current fiscal year and subsequent periods. Forward-looking statements include statements that are predictive in nature, depend upon or refer to future events or conditions, or include words such as "expects", "anticipates", "plans", "believes", "estimates", "seeks", "intends", "targets", "projects", "forecasts" or negative versions thereof and other similar expressions, or future or conditional verbs such as "may", "will", "should", "would" and "could".

