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CHARITABLE TRUST

Strengthening
Communities

[**intact**]

We are Purpose-Driven

At Intact, we value being socially responsible. Through the Intact Charitable Trust, we support our employees' and producers' generosity including volunteer, leadership, and philanthropic efforts. The Trust additionally advances education through a matching gift program and college scholarships. Also, through our Community Engagement Program, our local teams pursue hyper-local partnerships with nonprofits advancing economic resiliency. In this annual report, we are pleased to share insights on the Trust's 2024 sponsorships that reinforce our community's spirit of giving and compassion.

COMMUNITY ENGAGEMENT



Our Community Engagement program

is designed to support local nonprofits through sustained employee volunteerism. Pictured above are a few of our Boston, MA teammates: Shirley Jia, Judy Carrasco, Jane Crapo, Carmen Duarte and Erika Gonzalez.

Our year of *giving*

\$750,000

Donated in total

\$48,000

Awarded through scholarships to college-bound students

\$48,000

Contributed to nonprofits during the holiday season

\$350,000

Gifted through our Community Engagement program

100

Nonprofits supported in 2024

275+

Community Engagement employee volunteers

Nonprofit **Organizations**

The complete list of the nonprofits and schools supported in 2024

Action Angels	Council on the Environment, Inc. dba GrowNYC (3) *	Girl Scouts Troop 18378
All Hands and Hearts	CraveABLEs (All Are Able Inc.)	Grand Rapids Public Schools Foundation
Alzheimer's Association	Crohn's & Colitis Foundation	Habitat for Humanity New York City and Westchester County
American Cancer Society, Inc.	Deirdre's House *	Haymakers for Hope
American Foundation for Suicide Prevention	Denver Botanic Gardens	HIP Donelson Inc.
American Heart Association, Inc.	Emerge Mothers Academy	HomeAid Colorado
Angela Marotta Inho Foundation	Emmaus, Inc.	Home at Last Dog Rescue
Animals in Need Rescue Network	Evelyn Alice Walker Trust	Houston Association of Insurance Agents
Barney & Barney Foundation (4)	Family Promise of Forsyth County (2)	Hull Lifesaving Museum
Beth Luce Memorial Grant Fund LaSalle	Family Promise of Morris County	Illinois State University Foundation
Blaze Basketball Club	Feeding Southwest Virginia (3) *	IMA Foundation (3)
Bryan Louis Chaney Memorial Fund Inc	Feed My Starving Children	Insurance Industry Charitable Foundation (18)
California Maritime Academy Foundation (3)	Food Bank of Contra Costa & Solano	Jeremiah Program (3) *
Carver Scott Humane Society	Foundation Fighting Blindness	Johnson County Christmas Bureau
Caterina's Club	Foundation for Public Affairs	Junior Achievement of Northeastern New York
Cherry Creek Schools Foundation	Friendship Service Center, Inc. (2) *	Marsh USA LLC
Children's Hospital Los Angeles	Friends of RCACP (Regional Center for Animal Care & Protection)	Maurice J. Spagnoletti Foundation
Chrysalis Center, Inc. (3) *	Girl Scouts of Southeastern New England	Meals of Hope

Meals On Wheels Atlanta
 Mohawk Hudson Humane Society
 Music City Quarter Midget Racing Association
 Mustard Seed Ranch
 National Multiple Sclerosis Society
 Neighborhood Boys & Girls Club *
 Northside Achievement Zone
 Orangewood Foundation *
 Pan Massachusetts Challenge
 Pediatric Brain Tumor Foundation (3)
 Personal Best Charity, Inc.
 Pink Ribbon Good
 PLUS Foundation
 Q Foundation for Kids
 RiteCare of Minneapolis – St. Paul
 Rocky Mountain Bighorn Society
 Rutgers University Center for Women in Business *

Salem Police Department National Child Safety Council
 San Francisco - Marin Food Bank
 School on Wheels of Massachusetts (2) *
 Second Harvest Heartland
 Smile Train, Inc.
 Specially Gifted Foundation
 Special Olympics Colorado (2) *
 Spots Last Stop Inc
 St. Christopher Fund
 Stoner Creek Elementary PTO
 The Don't Be Next Foundation
 The Facial Pain Research Foundation, Inc
 The Insurance Library Association of Boston
 The Leukemia & Lymphoma Society
 The National Multiple Sclerosis Society (2)

The Surety & Fidelity Association of America
 Toys for Tots Minneapolis, MN
 UJA – Federation of New York
 United South End Settlements (2) *
 United Way of Lower Eastern Shore
 University of St. Thomas Actuarial Department (2)
 White Pony Express *
 Women's Lunch Place
 YMCA of Greater Boston
 Zion Animal Lovers (3)

Matching Gifts

Bentley University
 Fisk University
 Immanuel Lutheran High School
 Nichols College
 St. Croix Preparatory Academy
 The Kiski School
 Trustees of Dartmouth College
 University of California, Santa Barbara
 University of St. Thomas
 Xavier High School

Numbers in parentheses denote multiple donations.

*Organizations in our Community Engagement Program.

Stronger Communities through **Active Engagement**

We sponsored thirteen local Community Engagement partnerships – listed on the next page – throughout 2024. In addition to monetary contributions, the local teams engaged with these nonprofits as ongoing volunteers based on organizational needs and helped sponsor events. We look forward to enabling the program to further address economic resiliency in 2025!



Our New York City team nurtures climate resiliency while addressing food insecurity by supporting GrowNYC.

Cultivating Change

Over thirty of our New York City employees came together to make a positive impact on the planet by rolling up their sleeves and getting their hands dirty with GrowNYC — a non-profit empowering New Yorkers by focusing on food access and agriculture, green spaces, zero waste and education. **GrowNYC** supports regional farmers, builds and supports community gardens, and helps youth and their educators foster a lifelong appreciation of nature, healthy food, and sustainability.

Our team ventured to Governor's Island and spent a wonderful afternoon sprucing up the urban farm and community teaching garden, weeding, picking strawberries, and separating seed packets.

"It was a beautiful, fun, fulfilling day outdoors connecting with my fellow Intact colleagues while partnering with GrowNYC."

- Erica Colón
Surety, Intact



Our Denver and SOCO teammates were all smiles throughout their bowling day.

Striking Up Camaraderie

A spotlight volunteering event for our Denver Community Engagement team was hit the lanes with their nonprofit partner, **Special Olympics Colorado (SOCO)**, sparing time to build camaraderie. Athletes from across the state joined forces to showcase their skills and celebrate the power of sport.

At SOCO, they are committed to fostering a vibrant community where every athlete is valued and included. Intact's Dana Rodock shared, "The SOCO athletes and families are a caring and welcoming community; this truly didn't feel like volunteering – just a great day spent with friends." We're grateful for the chance to support their incredible mission!

Intact Office Nonprofit Partner

Anaheim, CA
Orangewood Foundation

Boston, MA
United South End Settlements

Canton, MA
School on Wheels of
Massachusetts

Chicago, IL
Neighborhood Boys & Girls Club

Denver, CO
Special Olympics Colorado

Farmington, CT
Chrysalis Center
Friendship Service Center

Hoboken, NJ
Rutgers Center for Women
in Business

Morristown, NJ
Deirdre's House

New York City, NY
GrowNYC

Plymouth, MN
Jeremiah Program

Salem, VA
Feeding Southwest Virginia

San Francisco, CA
White Pony Express

Empowering Employees to **Give Back**

We are always amazed and inspired by the range of charitable efforts supported by our employees and producer partners. Take a closer look at some of our one-off community efforts throughout this year.

Honoring Aon at the 18th Annual Northeast Benefit

The Charitable Trust supported an incredible evening at the 18th Annual Northeast Benefit hosted by the **Insurance Industry Charitable Foundation (IICF)** in New York City. The event brought together more than 600 insurance professionals to celebrate the industry's dedication to giving back while raising over \$1.4 million for nonprofit grants in the Northeast region. This annual industry celebration honored Aon, and a special highlight of the night was hearing from guest speaker Eli Manning.

"It truly was a special evening which exemplified the wonderful camaraderie and generosity of the insurance community."

– **Victoria Turchetti**
Business Development, Intact



Pictured left to right: Intact's Mike Kubis, Victoria Turchetti, Mike Seff, Travis Ochowicz, Leah Ohodnicki (EVP, Carrier Relations, RT Specialty), Katie Goon, Chris Gallagher (Producer, Alliant), and Jeff Duca

Mariners for a Cause

Intact hosted a table at the 19th Annual Scholarship and Awards Gala for the **California State University Maritime Academy Foundation** to benefit cadet students in 2024-2025. Representing Intact were Ocean Marine's Beth Kirkpatrick and Marie Meadows, who hosted Alex and Ryan Riske from Amwins Marine Group, Jason and Samantha Fazio of Hawser Marine Insurance Services, and two graduating cadets, Micah Frisch, and Max Roth. A truly special evening!

Cal Maritime is one of only seven degree-granting maritime academies in the United States — and the only one on the West Coast. We salute our teammates for supporting this program!



Pictured left to right: Ryan Riske, Alex Riske, Micah Frisch, Beth Kirkpatrick, Max Roth, Marie Meadows, Sam Fazio, and Jason Fazio.

Engaged from **coast to coast**

Kudos to our teammates who collectively demonstrate living our value of generosity!





Intact **Scholarship Program**

For the twenty-first consecutive year, Intact recognized deserving high-school seniors, as well all current undergraduate students, with college scholarships. Sixteen \$3,000 awards were distributed, including eight to Intact employees' children and/or grandchildren and eight to children and/or grandchildren of the company's distribution partners. Winners were selected based on criteria such as academic performance, leadership roles and participation in school and community activities. Our scholarship program is managed by Scholarship America®, a nonprofit scholarship program administrator, and is funded by the Intact Charitable Trust.

Agencies and brokers with scholarship winners:

- Insurance Office of America, Inc.
 - Marsh & McLennan Agency, LLC
 - Pierce Agency of Portsmouth, Inc.
 - Risk Placement Services, Inc.
 - SanBuck, Inc.
 - Snellings Walters Insurance Agency
 - Socius Insurance Services, Inc.
 - Summit Insurance Services, LLC
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About the Trust

In 2024, the Intact Charitable Trust donated about \$750,000 to the various nonprofits and schools noted on the previous pages. All organizations receiving donations from the Trust qualified as a nonprofit under the provisions of the Internal Revenue Code of 1986 § 501(c)(3).

For more information about the Intact Charitable Trust contact your Intact relationship manager or email charitabletrust@intactinsurance.com. You may also visit our [Social Responsibility page](#) on intactspecialty.com. For ongoing updates on our community-giving efforts, visit our Charitable Trust blog.

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Earl Emrick
Gary Fleming
Lee Havemeier
Meredith Martins
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Caitlin Patterson

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The Intact Charitable Trust USA is a tax-exempt private foundation under Section 501(c)(3) of the Internal Revenue Code managed by employees of Intact Services USA LLC.