



# *Strengthening Communities*



2023 CHARITABLE TRUST

## 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 a college scholarship program. Also, through our Community Engagement Program, our local teams pursue hyperlocal partnerships with nonprofits advancing economic resiliency. In this annual report, we are pleased to share insights on the Trust's 2023 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, our Anaheim, CA team presents a Trust donation to the Orangewood Foundation, along with a custom guitar built by our Morristown, NJ colleagues.

# Our year of *giving*

## \$500,000

Donated in total

## \$48,000

Awarded through scholarships to college-bound students

## \$48,000

Contributed to nonprofits during the holiday season

## \$185,000

Gifted through our Community Engagement program

## 100

Nonprofits supported in 2023

## 200+

Community Engagement employee volunteers

# Nonprofit *Organizations*

The complete list of the nonprofits and schools supported in 2023

American Cancer Society  
 American Foundation for Suicide Prevention  
 AMIS (Atlanta Ministry with International Students), Inc.  
 Barney & Barney Foundation (3)  
 Because Animals Matter  
 Beth Luce Memorial Grant Fund LaSalle  
 Boxes to Boots  
 Buffalo City Mission  
 California Maritime Academy Foundation (2)  
 Caterina's Club  
 Cherry Creek Schools Foundation (2)  
 Children Across America  
 Children's Hospital Colorado Foundation  
 Children's Hospital of Los Angeles  
 Children's Specialized Hospital Foundation Inc.

Christopher & Dana Reeve Foundation  
 Chrysalis Center, Inc. (3)\*  
 College Possible  
 Connecticut Foodshare  
 Contra Costa Food Bank  
 CraveABLEs (All Are Able Inc.)  
 Deirdre's House\*  
 Emmaus, Inc. (2)  
 Facial Pain Research Foundation  
 Family Promise of Forsyth County, Inc.  
 Family Promise of Morris County  
 Feeding Southwest Virginia (2)\*  
 Food Bank of the Rockies (3)  
 Foundation Fighting Blindness  
 Foundation for ARID1B Research (FAR)  
 Foundation for Public Affairs  
 Friendship Service Center Inc.

Friends of RCACP (Regional Center for Animal Care & Protection)  
 Girl Scout Troop 18378  
 Girl Scouts of Southern New England  
 Good Grief  
 Habitat for Humanity of NYC  
 Harvesters Community Food Network  
 Heroes for Children  
 HomeAid Colorado  
 Home at Last Dog Rescue  
 Houston Association of Insurance Agents Charitable Foundation, Inc.  
 Hudson Community Foundation  
 IMA Foundation (3)  
 Insurance Industry Charitable Foundation (9)  
 Jeremiah Program\*  
 Kako'o Maui, Council for Native Hawaiian Advancement  
 Katy Elks Lodge #2628 Sweetheart Program

La Crème Angels, Inc.  
 Leukemia & Lymphoma Society (2)  
 Maui Food Bank  
 Michigan State College of Law  
 Mountain Shadows Foundation  
 National Multiple Sclerosis Society  
 Neighborhood Boys & Girls Club (2)\*  
 New Jersey Blind Citizen Association  
 Northside Achievement Zone  
 OOIDA Foundation Inc.  
 Orangewood Foundation\*  
 Pan Massachusetts Challenge  
 Pediatric Brain Tumor Foundation  
 Personal Best Charity, Inc.  
 Pinky Swear Foundation  
 PLUS Foundation  
 Project: Cameron's Story  
 Rocky Mountain Bighorn Society  
 Rutgers Center for Women in Business\*

Salem Police Department National Child Safety Council  
 San Francisco-Marin Food Bank  
 School on Wheels of Massachusetts (2)\*  
 Science Museum of Minnesota  
 Shriners Hospital for Children  
 Smile Train Inc.  
 Society of St. Vincent de Paul  
 Special Olympics Colorado (2)\*  
 Special Olympics New Hampshire  
 St. Christopher Trucker Relief Fund  
 St. David's Center for Child and Family Development  
 St. Jude Children's Research Hospital  
 Tall Ships America  
 The Actuarial Foundation  
 The ALS Association  
 The Little Guild  
 The Pink Frog Foundation, Inc.  
 The Statesman Foundation

The Surety & Fidelity Association  
 The Women's Lunch Place  
 TrueNorth Legacy Foundation  
 United South End Settlements (2)\*  
 United Way of Greater Cleveland Oswald Fundraiser  
 United Way of the Lower Eastern Shore  
 University of Colorado Foundation  
 University of St. Thomas Actuarial Department  
 Wallin Education Partners\*  
 White Pony Express\*  
 Women's General Auxiliary to Shriners Hospital for Children  
 YMCA of Greater Boston  
 Youth Frontiers, Inc.  
 Zion Animal Lovers (2)

### Matching Gifts

Bentley University  
 Brown University  
 California State University Maritime Academy  
 Cretin-Derham Hall High School (2)  
 Dartmouth College  
 Ouachita Baptist University  
 Xavier High School

Numbers in parentheses denote multiple donations.

\*Organizations in our Community Engagement Program



## Stronger Communities through *Active Engagement*

We sponsored eleven Community Engagement efforts – listed on the next page – throughout 2023. In addition to monetary contributions, the local teams connected with these nonprofits as ongoing volunteers based on organizational needs and helped sponsor events. We look forward to expanding the program to further address economic resiliency in 2024!



Intact's Amanda Nanni, Katie Dilollo, Tim Bozzone, Tina Angelone, Jissell Varela (DH), Maria Savettiere (executive director at DH), Mark Wrightington, Anna Lach-Zynwala, Denise Mulligan, Tara Moat, Jackie Jenkins, Nick Calcagno, Sara Garcia and Lindsey Boehmer (sitting) helping restore the backyard of Deirdre's House.

### Enabling Good

Our Morristown Community Engagement team's nonprofit partner, [Deirdre's House](#), is a center in Morris County, NJ for child victims of abuse and/or neglect and for children that have witnessed violence. This center serves as the only local site where a child victim can be interviewed and digitally recorded by law enforcement, medically examined and treated by a pediatric abuse specialist, prepared for trial, and clinically counseled under one roof. This allows them to be continually cared for in a space they know and feel safe.

One way our team has been helping the nonprofit is through hands-on support at their "Days of Caring" initiatives. In one such event, the team painted, planted and power washed – transforming the backyard at Deirdre's House. Tina Angelone said, "It was amazing to witness the teamwork as the yard blossomed into a comfortable haven for the children." This effort, led by Leigh Ann Sheehan and Tina Angelone, is supported by more than 40 A&H team members.



Intact's Ryan Sosebee and Meredith Martins enjoying their time at USES.

## Engaging with Entrepreneurs

Summer camp is usually associated with outdoor time enjoying nature. For some kids, it means learning how to start your own business and within two weeks, bringing your product to market. That's exactly what a group of enterprising 5 – 12-year-olds attending **United South End Settlements'** (USES) summer camp experienced, aided by Intact's Boston-based team.

Over the course of two days, 13 Intact employees volunteered through our Community Engagement program to help these young entrepreneurs make braided string bracelets, all-natural fruit juices packaged in mason jars, keychains and more that were sold during a neighborhood marketplace event. We think Actuarial's Ryan Sosebee summed it up best, "I am looking forward to doing this more often!"

*"I am looking forward to doing this more often!"*

Ryan Sosebee, Actuarial, Intact

## 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

**Hoboken, NJ**  
Rutgers Center for Women in Business

**Morristown, NJ**  
Deirdre's House

**Plymouth, MN**  
Jeremiah Program & Wallin Education Partners

**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.

### Building Support

A volunteer experience through the **Twin Cities Habitat for Humanity** brought our Plymouth Actuarial and Risk Management teams together to help local people build a place they can call home. The positive effects of habitat ownership ripple to every area of a family's life (health, safety, education outcomes, and financial opportunity) and the impact extends for generations.

Maria Hoffer reflected on her experience: “Volunteering was a fulfilling and rewarding experience – not only were we able to help provide a dwelling place for a family, but we were also able to do it as a team and build a strong sense of camaraderie among coworkers.” Together they put up drywall throughout the house – a critical step!

*“Volunteering was a fulfilling and rewarding experience ...”*

**Maria Hoffer**, Risk Management, Intact

**Photo right.** Standing row: Intact's Hailey Gillen, Emily Sellner, Connor Glinski, Maria Hoffer, Anders Beyer, Sam Kuennen, and Gunner Robison. Sitting row: Jenny Miller, Hannah Kojetin, Kaya Gendreau, Lisa Jaskowiak, and Brooke Johnson building camaraderie while volunteering at Habitat for Humanity.





## Stepping Up for a Good Cause

During the early spring, 308 Intact employees joined nearly 3,000 industry colleagues in fundraising for children's hunger relief through the [Insurance Industry Charitable Foundation's](#) annual Step Up Challenge. We are proud to celebrate Strrior as winners of the team challenge and Robin Smith from Denver Claims, the second-place individual winner!

## Mountain Shadows Golf Tournament

Jordan Slay and Travis Sturms from our Technology segment tee'd off at the [29th Annual Mountain Shadows Foundation Fall Classic](#) in Southern California. The Mountain Shadows Foundation is an organization dedicated to advocating for people with intellectual disabilities. Their mission is to provide a secure family environment that fosters enriching relationships, independence, and growth to individuals within the community. The golf tournament helped raise funds for the CARE program, which provides recreational and social experiences to residents and participants. For the last few years, Intact has been a proud sponsor of the annual event. The cause was first introduced to the Technology team by their producer partner at Hub International. Hub is a large sponsor of this tournament as well as having close involvement with the organization.

It was a bright, sunny, and beautiful day to be out on the course – all while playing for a worthy cause.



Standing row: Strrior's Jamie Garcia- Fons, Richard Girden, Kristin Buhagiar, Kara Epping, and Allison Hartkopp. Kneeling row: Kaileigh Bowe, Brad Bowe, and Nicole Guzaldo celebrating their Step Up Challenge win.



Intact Technology's Travis Sturms (far left) and Jordan Slay (far right) with Blaine Sherwin and Jared Pelissier from Alliant enjoying their time together at the Mountain Shadows Golf Tournament.

## Engaged from coast to coast

Kudos to our teammates in California, Connecticut, Illinois, Massachusetts and Virginia who collectively demonstrate living our value of generosity!







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## *Intact* **Scholarship Program**

This year marked an exciting milestone: for the twentieth consecutive year, Intact recognized deserving high-school seniors, as well as 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:**

- Allen Insurance and Financial
  - Breckenridge Insurance Services
  - Brown and Brown
  - Harmon Dennis Bradshaw
  - International Special Risks Inc.
  - Marsh USA
  - Smith Manus
  - Synapse Services, LLC
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## About the Trust

In 2023, the Intact Charitable Trust donated over \$500,000 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 email **charitabletrust@intactinsurance.com** or contact your Intact relationship manager. 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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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.