



*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	Christopher & Dana Reeve Foundation	Friends of RCACP (Regional Center for Animal Care & Protection)
American Foundation for Suicide Prevention	Chrysalis Center, Inc. (3)*	Girl Scout Troop 18378
AMIS (Atlanta Ministry with International Students), Inc.	College Possible	Girl Scouts of Southern New England
Barney & Barney Foundation (3)	Connecticut Foodshare	Good Grief
Because Animals Matter	Contra Costa Food Bank	Habitat for Humanity of NYC
Beth Luce Memorial Grant Fund LaSalle	CraveABLEs (All Are Able Inc.)	Harvesters Community Food Network
Boxes to Boots	Deirdre's House*	Heroes for Children
Buffalo City Mission	Emmaus, Inc. (2)	HomeAid Colorado
California Maritime Academy Foundation (2)	Facial Pain Research Foundation	Home at Last Dog Rescue
Caterina's Club	Family Promise of Forsyth County, Inc.	Houston Association of Insurance Agents Charitable Foundation, Inc.
Cherry Creek Schools Foundation (2)	Family Promise of Morris County	Hudson Community Foundation
Children Across America	Feeding Southwest Virginia (2)*	IMA Foundation (3)
Children's Hospital Colorado Foundation	Food Bank of the Rockies (3)	Insurance Industry Charitable Foundation (9)
Children's Hospital of Los Angeles	Foundation Fighting Blindness	Jeremiah Program *
Children's Specialized Hospital Foundation Inc.	Foundation for ARID1B Research (FAR)	Kako'o Maui, Council for Native Hawaiian Advancement
	Foundation for Public Affairs	Katy Elks Lodge #2628 Sweetheart Program
	Friendship Service Center Inc.	

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 programs – 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.

“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.

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!



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 Striior 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: Striior'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!





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

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](https://www.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.