

2022

ANNUAL REPORT

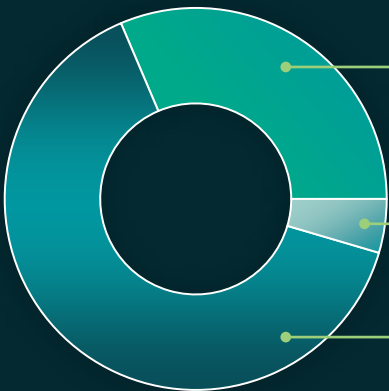


Generosity changes everything

2022 Highlights

\$48.34 Million

Total Donations
in 2022



\$15.1 Million
Gifts of Publicly
Traded Securities

\$2.2 Million
Gifts of Private
Company Shares

\$30.96 Million
Gifts of Cash

\$240.9 Million

Assets Under Management



\$40.4 Million

Distributed to **1,998** Canadian Charities & Qualified
Donees, which represents **16.57%** of our 2022 asset base.

Your Generosity is Changing the World

2022 was a fruitful year for the foundation.

Once restrictions were lifted many businesses reopened, and people began to gather with friends and family once more. At Abundance Canada, we were finally able to meet with clients face-to-face again. We strengthened existing relationships and had our first all-staff in-person meeting since 2019. **Not to mention, we had the privilege of connecting with 324 new clients!**

2022 was a difficult year for donors and many charities. According to Imagine Canada research (an organization committed to helping the charitable sector) 48% of Canadian adults planned to make a donation this past Christmas season. That represents a drop of 8% from 2021, and of those planning to make a charitable gift, 38% said they would give less than in previous years. No doubt this will hurt the charitable sector still trying to recover from the loss of volunteers from the pandemic and an increase in demand for social services.

Despite the uncertainties, we witnessed something incredible. **We saw generosity that seemed to sidestep all the anxiety and fear — we saw people respond with optimism and hope!**

Let The Numbers Talk

Through the generosity of our clients, we issued charitable receipts in the amount of \$48.34 million in 2022. As well, distributions to charity last year saw two new high-water marks: \$40.4 million distributed to 1,998 charities. This amount represents 16.57% of our 2022 asset base. (3.5% was the minimum disbursement quota (DQ) as required by the CRA in 2022. The CRA DQ will increase to 5% in 2023.)

Here's the exciting news — 2022 was one of the most impactful years in our organization's nearly 50-year history! (See more on pages six and seven.)

As a client, you aren't content with the status quo. A Generosity Plan™ is a way of seeing what the world could be. You dream. You plan. You give generously. In the process, you've also allowed us to walk alongside you. **Thank you! Your generosity really is changing the world.**

The Path Ahead

We are constantly seeking ways to improve our service and commitment to our clients. Last year, we asked a cross section of clients and professional advisors in our network to provide their feedback on the organization. We heard from you that we should share more about what we're doing and how we're preparing for future trends.

With that in mind, our board and staff have re-imagined our Vision and Mission statements. The result is our newly formed Purpose statement. We believe it captures the essence of Abundance Canada:

Abundance Canada believes generosity changes everything. Generosity is transformational for the donor and recipient, and the world is a better place when people live generously. We offer customizable gift planning options to donors for greater charitable impact.

Time and time again we hear from clients how important it is for them and their families to participate in the act of giving. Being part of that transformational process is what we're all about.

As we journey into 2023, we look forward to sharing our plans and how they will positively impact your experience with Abundance Canada.

We are honoured to serve you and we fully appreciate the trust you have placed in us as your partner in charitable giving. Thank you!



Shannon

Shannon Peters
Board Chair



Darren

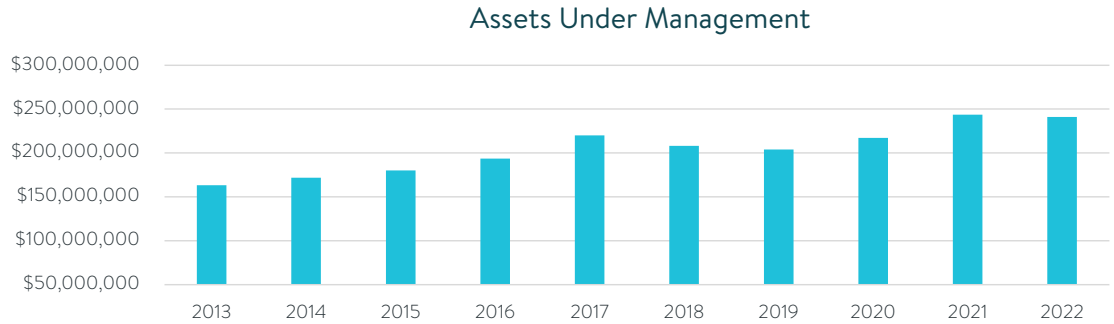
Darren Pries-Klassen
Chief Executive Officer

Annual Trends

Unaudited Numbers as of December 31, 2022

(Our most recent audited financial statements are available at abundance.ca)

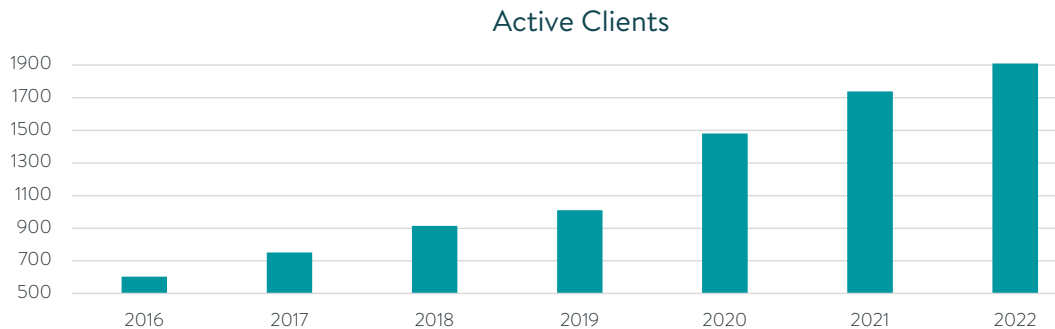
\$240.9 Million
Assets Under
Management



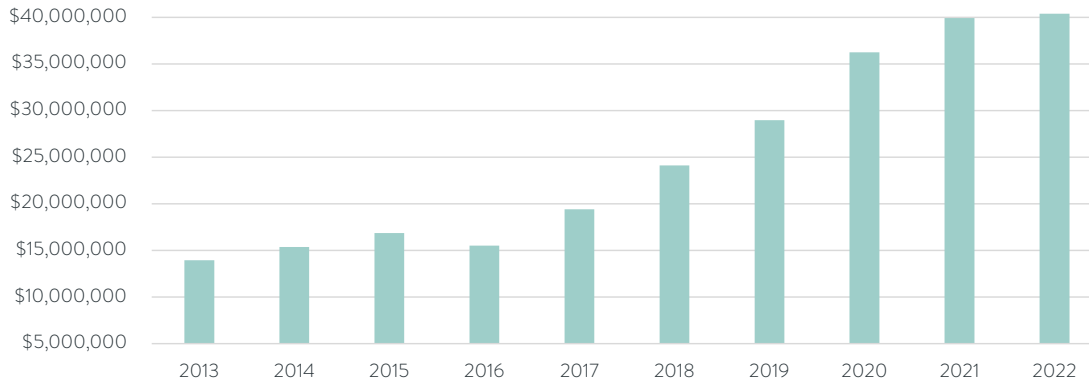
\$15.1 Million
in Gifts of
Securities



1,910
Active Clients



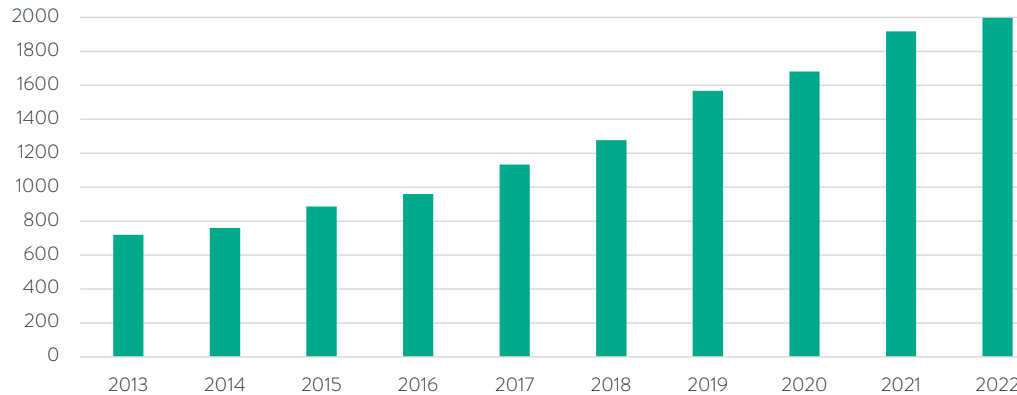
Distributed to Charity



\$40.4 Million

Distributed to Canadian Charities & Qualified Donees

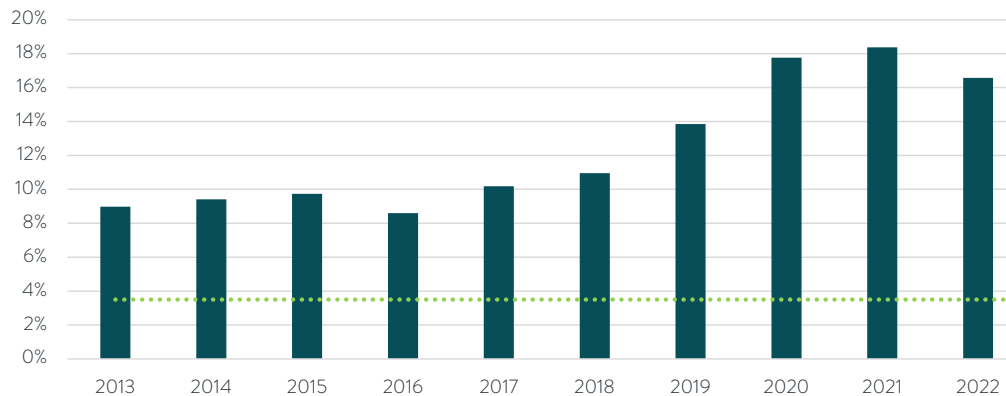
Number of Recipient Charities



1,998

Recipient Canadian Charities & Qualified Donees

Percentage of Asset Base Distributed to Charity



16.57%

of Asset Base Distributed to Canadian Charities & Qualified Donees

..... 3.5% is the minimum disbursement quota as required by the CRA in 2022.

Board of Directors



Shannon Peters
Board Chair



Jennifer Thompson
Vice Chair



Abe Bergen
Secretary



Clayton Loewen
Treasurer



Ross Weaver
Board Member



Anita Retzlaff
Board Member



Robert Heinrichs
Board Member



Stephen Yantzi
Board Member



Alan Walker
Board Member



Gillian Doucet Campbell
Board Member

Leadership Team



Darren Pries-Klassen
Chief Executive Officer



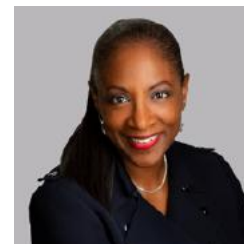
Rick Braun-Janzen
Director of Gift Planning



Gloria Rengifo
Director of Finance



Shelly Wilcoxson
Director of Operations



Barbara Chambers
Director of Communications

Foundation Staff

Ontario & Eastern Provinces



Marlow Gingerich
Gift Planning Consultant



Sherri Grosz
Gift Planning Consultant



David Barker
Gift Planning Consultant



Denise Mazik
Office Administrator

British Columbia



Brad Friesen
Gift Planning Consultant



Katherine Smart
Gift Planning Consultant



Irm Nickel
Office Administrator

Alberta



Kevin Davidson
Gift Planning Consultant



Peter Dryden
Gift Planning Consultant



Cathy Dyck
Office Administrator

Manitoba & Saskatchewan



Harold Penner
Gift Planning Consultant



Susan Yakabowich
Gift Planning Consultant



Jill Angus
Office Administrator

Our Purpose

Abundance Canada believes generosity changes everything. Generosity is transformational for the donor and recipient, and the world is a better place when people live generously. We offer customizable gift planning options to donors for greater charitable impact.

Accredited by Imagine Canada for excellence in nonprofit accountability, transparency and governance.





Generosity changes everything

1.800.772.3257 • generosity@abundance.ca • abundance.ca

Charity Registration No. 12925 3308 RR0001