

Financial Resilience Institute

Working with clients and partners to drive positive change

Helping to improve financial and overall resilience as a partner

“Sneaky Smart”

Bank CEO of a Canadian Bank

“Impactful strategic consulting,
data and analytics”

VP of Sustainability, Co-operators

As a non-profit organization and leading independent authority on financial well-being in Canada we're dedicated to improving financial health, resilience and well-being for all


Improving Financial Resilience for All

We partner with financial institutions, business leaders, and policymakers to develop and implement solutions that improve financial resilience, health and well-being for all.

Financial services innovation, public policy and programs work best when rooted in data and facts.

Our research, impact measurement, and cross-sector collaboration spark solutions in programs and practice.

We're working to help expand opportunities for people, small businesses and communities and improve financial resilience for all.



Research,
Measurement
and Analytics



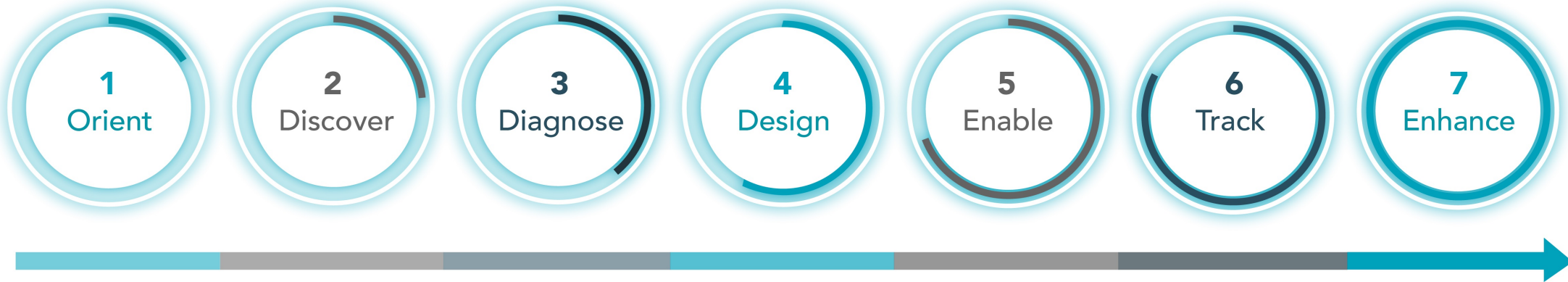
Strategic
Consulting
and Advisory



Custom
Projects
and Solutions

Services and Impact

With oversight from our Board of Directors and Advisory Council, our organization provides customized offerings



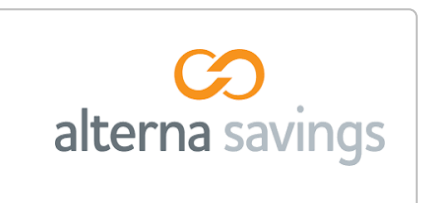
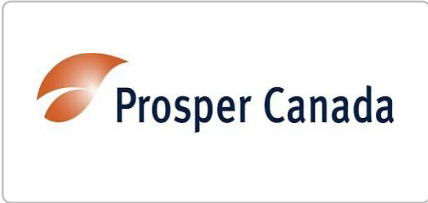
Services and Projects include:

- Client financial resilience Index analytics and benchmarking
- Financial health and resilience impact measurement advisory ESG reporting and target setting
- Financial health data analytics and modelling
- Enterprise wide or targeted financial health strategies
- New product and CX strategy and innovation combining qualitative and quantitative research and co-creation
- Employee financial wellness strategies, programs & measurement
- Proprietary financial health index models, tools and solutions, also based on transactional data
- Small business financial health strategies, measurement and solutions
- Value proposition development and support for pilots, testing and learning
- Independent commissioned reports
- Joint research and cross-sector impact and collaboration projects
- Board, Leader and Employee Education and Innovation workshops
- Public Speaking Engagements and Thought-Leadership
- Other bespoke offerings and consulting based on your business needs

We partner and support organizations wherever they are at in their financial health and resilience innovation journey



Clients and Partners We've Worked With



Client Testimonials



"Eloise and her team have been exceptional business partners for Conexus. They are responsive, innovative and dare I say 'sneaky smart'. We have tremendous respect for their skills and would engage them again tomorrow if the need arises. They epitomize what it means to partner with organizations."

Eric Dillon, Former CEO at Conexus Credit Union and President General Bank of Canada

"The Financial Resilience Institute team has invested the time and energy to get to know our team and organization and meaningfully engage with our senior leaders. This has helped orient us in our purpose-led journey and get critical buy-in around the opportunities the Seymour Financial Resilience Index ® brings in helping us achieve our purpose of financial security for Canadians and our communities. Eloise and her team have provided impactful strategic consulting, data, and analytics for Co-operators, and we are now a funder of the Financial Resilience Institute to help further amplify the Institute's impact in communities across the country."

Chad Park, VP Sustainability and Citizenship, Co-operators

"Eloise is an exceptional and generous thought leader, providing much-needed data and analysis to the ecosystem of organizations dedicated to the financial health and financial resilience of Canadians. The Seymour Financial Resilience Index® has been vital in guiding Vancity's commitment to Financial Health and Inclusion, providing useful insight on how to build the financial resilience of our members and communities."

Andrea Harris, VP Impact Strategy, Vancity

"Eloise Duncan helped us to develop our four-year enterprise strategy, financial wellness and small business financial strategy. Partnering closely with our leaders, she helped us discover new possibilities, assess our gaps and create compelling new strategies to transform the way we do business."

Shawn Good, CEO of Libro Credit Union, previous CEO of Prospera

Contact us to explore partnership
and impact opportunities

www.finresilienceinstitute.org



Eloise Duncan CEO and Founder



CEO and Founder, Financial Resilience Institute (founded in 2022)

Social entrepreneur, Canada's leading expert on financial health, lived and worked in six countries

Starter of ventures and creator of the Institute's peer-reviewed Financial Resilience Index model ^[1]

Certified Management Consultant (CMC) and member of the Association of Certified Management Consultants in B.C.

Global Advisor/ reviewer for UN-PRB on financial health and inclusion measurement

Previous CEO and Founder, Seymour Consulting, a boutique consulting firm and social enterprise

Worked in banking in Europe and Canada: NatWest-RBC (UK) and Vancity (Canada)

Director Small Business Banking Strategy and expert small business financial health strategy innovation

Led enterprise CX and social enterprise strategy projects for leading organizations

[1] The Index is called the Seymour Financial Resilience Index ®. This has a registered trademark and is used under license by Financial Resilience Society, dba Financial Resilience Institute.