

## Working to improve financial resilience and well-being for all

<u>Financial vulnerability</u> is a mainstream issue and <u>problem we're trying to help solve</u> with this affecting Canadians of all income levels and in particular more vulnerable populations. Financial resilience and well-being of individuals support family and community well-being across generations. The health and resilience of small businesses are also critical to thriving, prosperous economies.

As the <u>leading independent authority</u> on financial well-being in Canada, we empower purpose-driven organizations to profoundly understand, benchmark, and improve the financial health and resilience of their customers, employees, and communities. By partnering with us, these organizations accelerate innovation in their programs and services, leading to tangible improvements in customer loyalty, financial outcomes, and social outcomes.

We began in 2009 as Seymour Consulting, a social enterprise. As of September 2022, we're a non-profit organization with offices located in Vancouver, Canada. Our goal remains the same: ensuring every Canadian has the financial resources and help to build their financial resilience, health and well-being. We work with Financial Institutions, Policymakers, Employers, clients and partners wherever they're at in their financial health and resilience innovation journey, so they can achieve their business, customer and ESG goals. Our evidence-based research analytics, impact measurement, and cross-sector collaboration spark solutions in programs and practice.

<u>Our organization</u> was founded by Eloise Duncan, CEO and Founder. Governed by a <u>Board of Directors</u> with a senior <u>Advisory Council</u> with representatives from across the ecosystem, we are leading work in Canada and globally to drive positive change. We're growing our team, impact and scale while working with a valued clients, partners, funders and <u>subscribers</u> in Canada and around the world.

Financial Resilience Institute has published numerous ecosystem <u>reports</u> on the financial resilience, health and well-being of Canadians since 2017. These reports build on the peer-reviewed <u>Seymour Financial Resilience Index</u> ® and National Financial Well-Being Studies. The Index has applications in other countries, and our team also develop proprietary solutions for clients around the world.

We lead <u>projects</u> that help clients deliver differentiated value propositions, drive profitable growth, accelerate and measure their impact. We empower consumers to understand and improve their financial resilience while building a more resilient, equitable and inclusive world. We're also leading work to improve small businesses' financial health and employees' financial resilience and wellness. Our services include <u>research</u>, <u>analytics and impact measurement</u>, <u>financial health consulting and advisory</u> and <u>collaborative impact projects</u>. Partnering with us means a tailored approach to projects, strategies and offerings. We have proven research, strategy development and innovation methodologies that engage stakeholders and drive results.

Our non-profit organization leads impactful work and programs in line with our <u>impact goals</u> thanks to the generous support of our grant <u>funders and supporters</u>. For more information on our expert <u>team</u> and client testimonials visit <u>finresilienceinstitute.org</u>.

Please <u>contact us</u> to become a client, funder or supporter or to explore opportunities for new programs or partnerships.

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