

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 and global citizens of all income levels, and in particular more vulnerable populations. Financial resilience and well-being of individuals supports family and community well-being across generations. The health and resilience of small businesses are also critical to thriving, prosperous economies.

As a non-profit organization we unite around our purpose - building financial resilience and well-being together. We are driven by a key vision, to create a better world through improved financial resilience and financial well-being for all

To fulfill this, as a <u>leading independent authority</u> on financial well-being in Canada and globally, 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 in their financial health and resilience innovation journey, so they can achieve their business, customer and social impact 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 systemic change. We're growing our team, impact and scale while working with valued clients, partners, funders and <u>subscribers</u> in Canada and around the world.

Financial Resilience Institute publishes numerous independent, <u>free reports and intelligence</u> on financial resilience, health and well-being and contributes to global financial health impact measurement and <u>thought-leadership</u> globally. Independent longitudinal tracking build on the Seymour Financial Resilience Index ® and peer-reviewed <u>Financial Resilience Index Model</u>; <u>Financial Well-Being Index Model and Toolkit</u> and national Financial Well-Being Studies. These have applications in many countries. Our team develop proprietary solutions and support impact projects with partners to enable targeted support for <u>those who need help most.</u> Driven to help empower all Canadians and global citizens, we launched a free <u>financial resilience score tool</u> and bank of articles and resources to help people move forward. Recently, our non-profit has released a free, publicly-available <u>Financial Well-Being Index Model and Toolkit</u> to provide a global measure of financial well-being at multiple levels, and help spur policy and program innovation.

We lead <u>projects</u> in Canada and globally with Financial Institution clients and Strategic Partners so they can deliver differentiated value propositions, drive profitable growth and measurable impact. We work to help improve financial inclusion, financial health and financial empowerment, while building a more resilient, equitable and inclusive world. Our services include <u>research</u>, <u>analytics</u>, <u>benchmarking and impact measurement</u>; <u>financial health consulting and advisory</u>, <u>subscriber offerings</u>, <u>customer financial resilience scoring</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 support of our <u>strategic partners</u>, <u>funders and supporters</u>. Read about our progress against our impact goals over the past two years in our recently published <u>impact report</u>. For more information on our expert <u>team</u>, <u>projects</u> or testimonials visit finresilienceinstitute.org.

Please <u>contact us</u> to become a client, funder or supporter or to explore opportunities for new programs or partnerships. Eloise Duncan, our CEO and Founder can also be reached directly at <u>eloise@finresilienceinstitute.org</u>.

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