

Wealthsimple Foundation



Investing in people, not just portfolios

The Director's Cut: Our 2025 Story



Hi Friends,

2025 marked a turning point for Wealthsimple Foundation. After years of championing education savings through Canada Learning Bond promotion, we set our sights on helping young people build real financial skills, confidence, and resiliency.

The truth is, today's youth are facing some of the toughest economic headwinds in a generation. Rising costs. Stagnant wages. A financial system that often feels like it wasn't designed for them. And yet, everywhere we go, we meet young people with huge ambition.

That's why we made a strategic shift from education savings promotion to direct money talks, financial education and community-based support, meeting youth where they are, partnering with schools and community organizations, and building the kind of learning experiences that help them unlock opportunity.

And the results speak for themselves: 88 percent would recommend us to a friend and nearly 75 percent of students reported changing a financial habit after taking part in our programming.

Young people told us that they're saving differently, thinking differently, and most importantly, believing in their financial futures.

As we look ahead, and work to improve our program and service delivery, our goal stays the same: Ignite ambition and unlock opportunity to build brighter futures for the next generation of Canadian youth.

Thank you for being part of this work.

**— Emily Naddaf
Director, Wealthsimple Foundation**



2025 Highlights at a Glance

Making Financial Education Pop Off... The Page

Through virtual and in-person programs, and in partnership with community organizations across Canada, we created spaces where young people could build financial confidence, explore investing, and take action toward brighter financial futures.

159

events and
workshops

11.8K

learners

20+

community and education
partners

Hard Stats, Real Impact

🤝 We're Trusted

88%

would recommend
us to a friend

✨ We're Resonating

85%

rated our programs
as engaging

🔁 We're on Replay

91%

would attend our
events again

🏎️ We're Driving Change

83%

are likely to take
real financial action
after participating

Since we started, we've reached

527,090

Canadians with our resources and events!

...And Pop On the Screen!

-  Money Master Class series had **145K** unique viewers
-  Over **1.65M** views on our digital resources
-  **950+** students learned their investor type with our interactive quiz



We're Growing... Quickly

+354%_{YoY}

more students supported through our events & workshops!

+77%_{YoY}

more events delivered this year!

What does the community have to say?



"Wealthsimple Foundation events feel like a second learning home for me, it's such an inspiring space. As a first-gen Canadian, building financial independence can feel a little intimidating at times, however, these events not only teach me so much, they also let me connect with peers who are going through the same journey. That honestly means the world."

- Purvi Jaswal, Community Participant

"The Foundation provided a unique opportunity to connect with like-minded individuals from diverse backgrounds while exploring essential financial topics. The workshops offered fresh insights and strategies that helped deepen my understanding of personal finance."

- Jasvin Ruvendra, Community Participant



The Real MVPs: Our Partners



Wealthsimple



Toronto
Community
Housing



THE **MINA** PROJECT
mentoring inspiring networking accessing



💡 Partner Spotlight: ISP with Junior Achievement

We've joined forces with **Junior Achievement Canada** and **CIRO** to refresh and scale the **Investment Strategies Program**. Our largest partnership ever, ISP is designed to teach 25,000 students each year, from coast to coast, about investing. **Through this partnership, grade 8 to 12 students across Canada will get access to:**

- 📚 Modernized curriculum built for youth
- 📈 Real-time stock market simulations
- 💡 Volunteer-led workshops that make finance relatable
- 🏦 Practical guidance on saving, budgeting, and investing

"Wealthsimple Foundation's investment enables us to create and deliver high-quality, experiential learning resources that not only align with curriculum, but also make a lasting impact on the lives of young people."

— Jennifer James, VP of Programs, JA Canada

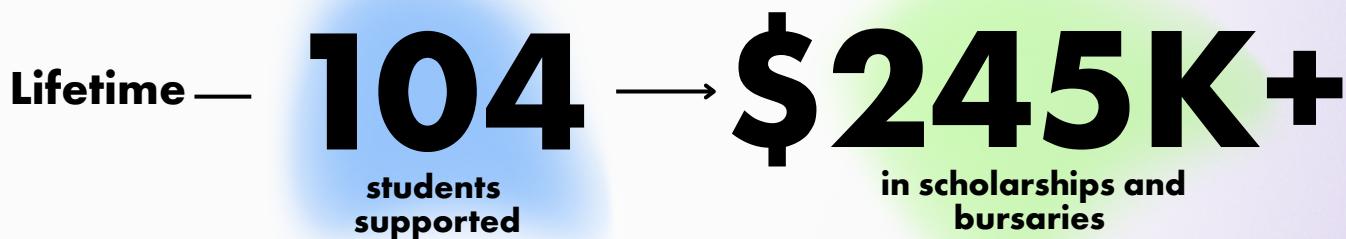
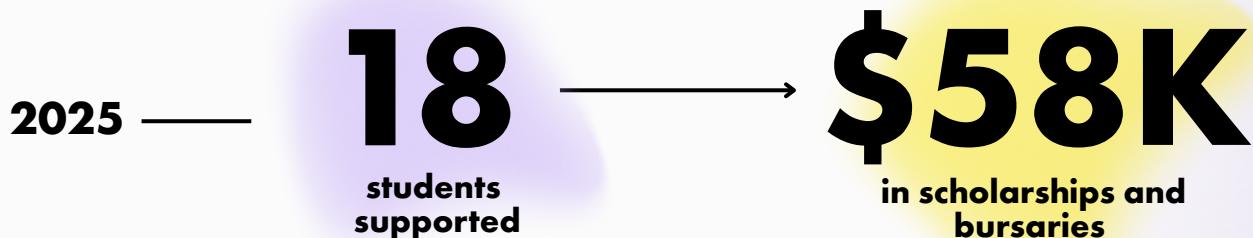


Betting Big on the Next Gen



Through our Scholarships and Bursaries program, we support young people from diverse communities as they pursue futures across business, STEM, trades, arts, and more.

*Thank you to the Yves and Cynthia Bled Future Achievers Fund for their
\$25,000 scholarship donation.*



Impact, In Their Words

"Receiving the Wealthsimple Foundation scholarship meant a lot to me both academically and personally. The financial support relieved a significant amount of stress and allowed me to focus more on my coursework and overall university experience. Knowing that they believed in me and my goals was incredibly motivating, and I am very grateful for the opportunity and support they provided."

- Vaishali Kaverimanian



Our Biggest Supporters, On and Off the Clock



140

Wealthsimple Employee
Volunteers

770

Social Impact Hours

Wealthsimple's partnership is core to our mission—fueling youth financial confidence and brighter futures. In 2025, Wealthsimple Giveback contributed **\$857,000**, bringing its lifetime investment to **\$3,919,987**, amplified by Wealthsimple employees' time and talent.

Volunteers of the Year

Community Award

Godwin Chan

Recognizes a volunteer with the most hours at community events.



Behind the Scenes Award

Christina Bock

Recognizes a volunteer with the most hours supporting operational projects and initiatives.



Foundation's Choice Award

Marc Tavas

Recognizes a volunteer whose multi-year contributions have made a lasting impact on our work.



Wealthsimple Foundation

Dream Team ⚡

Our Board



Luke Connell
CEO, Carbon Run



Caroline G. Gayle
Managing Director,
Accenture



Sue Gillespie
Past-President & CEO,
Pathways to Education



Blair Wiley
Chair, Chief Legal
Officer, Wealthsimple

Our Team



Emily Naddaf
Director, Strategy and
Community Growth



Gina Skocai
Senior Associate,
Community Engagement



Mohammed Ali
Specialist, Community
Marketing

Our 2025 Interns



Tobin Tang
Winter 2025



Sarah Lieng
Summer 2025



Ebube Mbanefo
Fall 2025

Looking ahead... 2026 & Beyond

Our focus for next year: Impact.

We're deepening our understanding of what it takes to build financial freedom for the next generation.

The momentum is building. Join us.

**Wealthsimple
Foundation**