

2025 IMPACT REPORT

First West Foundation

Helping communities thrive through local giving
and trusted partnerships.



Photo courtesy of Human Nature Counselling Society, 2025 Grantee

Message from the Board Chair

At its heart, the First West Foundation exists to help our communities thrive. That phrase — simple as it sounds — carries real weight when you've had the chance to see it in action. This past year I had the privilege of visiting some of the organizations our foundation supports, including Langley Meals on Wheels and Wagner Hills Farm Society. Sitting across the table from the people doing that work in our communities — and meeting those who benefit from it — is a powerful reminder of why this Foundation matters. The ripple effect we speak of is very real, and very visible, in the faces of the people our charitable partners serve every day.

2025 was a remarkable year by the numbers. We awarded 150 grants — a 50% increase over 2024 — and disbursed \$2.25 million, achieving a 12% disbursement rate for our regional community endowments, the highest in the Foundation's history. The Foundation received the highest private contribution in its history, with the establishment of the Ponderosa Pine Needle Fund, a generous \$2 million endowment from a Valley First family. Our investment portfolio grew to over \$23 million, reflecting the continued confidence of our donors and the sound stewardship of our Finance and Investment Committee. Through it all, our commitment to Trust-Based Philanthropy remained the foundation of how we work — reducing barriers, elevating relationships, and trusting our community partners to do what they do best.

This was also a year of significant transition. After 21 years with First West Credit Union, now Tru Cooperative Bank — eight of them leading this Foundation with dedication, wisdom, and grace — Susan Byrom retired in April. Jackey Zellweger, whose eight years of steady, caring presence shaped so much of our day-to-day work, retired in March. On behalf of the entire Board, I want to express our deep gratitude to both Susan and Jackey. Their contributions are woven into the fabric of what this Foundation has become, and their impact will be felt for years to come.

I am equally pleased to welcome Tracy Fortino as Interim Executive Director, and Kate Dunbar, our new Manager of Foundation and Community Programs. Tracy and Kate have stepped into their roles with energy and capability, and the Foundation is in very good hands.

As we look ahead, our strategy is clear — deepen our impact in the communities we serve, grow our capacity thoughtfully, and stay true to the values that have guided us since 1996. The work is meaningful. The need is real. And this Foundation — its board, its team, its donors, and its partners — is more than equal to it.

My sincere thanks go to my fellow Board members, to Tru Cooperative Bank for their ongoing financial and operational support, and to every donor whose generosity makes it all possible.

Jeff Dyck, 2025 Board Chair, First West Foundation

Message from the Executive Director



Tracy Fortino

At First West Foundation, community is the purpose that guides everything we do. Through strong relationships, trust-based partnerships and the generosity of our members and donors, we work to help communities thrive.

In 2025, that shared commitment resulted in more than \$2.25 million in grants supporting 150 charities across British Columbia, including a record 12% disbursement rate from our regional community endowments. Guided by trust-based philanthropy, nearly \$2 million of our granting was provided as unrestricted funding, reducing administrative burden and centering community organizations as leaders in defining and achieving impact.

Our support spanned critical priority areas including food security, poverty reduction, mental health and well-being, education, and advancing equity, aligned with the United Nations Sustainable Development Goals. These investments reflect our belief that meaningful, lasting change is strongest when shaped by those closest to the work.

This impact is made possible by the generosity and trust of our donors and members. Through endowments, legacy gifts, payroll giving and employee-led initiatives, individuals across Tru Cooperative Bank (formerly First West Credit Union) communities continue to demonstrate that collective generosity creates powerful ripple effects. With operating costs covered by Tru Cooperative Bank, every donated dollar goes directly to community impact.

This year also marks a moment of gratitude as we recognize Susan Byrom, whose retirement follows nine years of dedicated leadership as Executive Director. Susan's unwavering commitment to community, her leadership in embedding trust-based philanthropy, and her stewardship through the Foundation's largest granting years have left a lasting legacy. We thank her sincerely for her vision, care and enduring impact.

As we look ahead to becoming Tru Charitable Foundation, we do so with optimism, carrying forward our commitment to local solutions, strong partnerships, and community led impact. It is a privilege to walk alongside our partners, donors, and members as we continue to strengthen communities today and for generations to come.

THANK YOU

A Legacy of Partnership and Community Philanthropy

It is with immense gratitude that the Foundation says goodbye to its long-standing Executive Director, Susan Byrom, and Specialist, Jackey Zellweger.

During her 9-year tenure as Executive Director, Susan led the Foundation into a new era of Trust-Based Philanthropy and successfully stewarded the organization through the largest disbursement rate in the Foundation's history. As a leader, Susan has always kept our communities and charitable partners at the heart of First West Foundation's decision-making and evolution.

Since joining the Foundation in 2018, Jackey has modelled what it truly means to listen to, and learn from, our charitable partners. She took trust-based philanthropy from an ambitious goal to a day-to-day reality, integrated within every step of our grant-making cycle. She will be missed not only by the First West Foundation team, but by all our charitable partners with whom she has built relations of mutual trust and support.

The vision, values and principles that the Foundation proudly espouses today, as well as the strong ties we have with our community partners, are Susan and Jackey's legacy. We thank them for their unwavering dedication, leadership and commitment to the Foundation and to our communities, and we wish them the best in their next chapter.



Susan Byrom



Jackey Zellweger

Our mission and vision

Our vision

**We help our
communities thrive.**

Our mission

**We amplify generosity
to transform our
communities.**

Our History

1996 to
today

Founded for lasting community impact

A federally registered charity and private foundation affiliated with Tru Cooperative Bank, the Foundation was created by the cooperative bank's Board and Executive to provide a stable, enduring source of funding for the communities it serves.

A resilient, locally grounded funding model

Income generated from 19 endowments sustains strategic grant making across British Columbia, enabling support that remains consistent through changing economic conditions and responds to both immediate needs and systemic challenges.

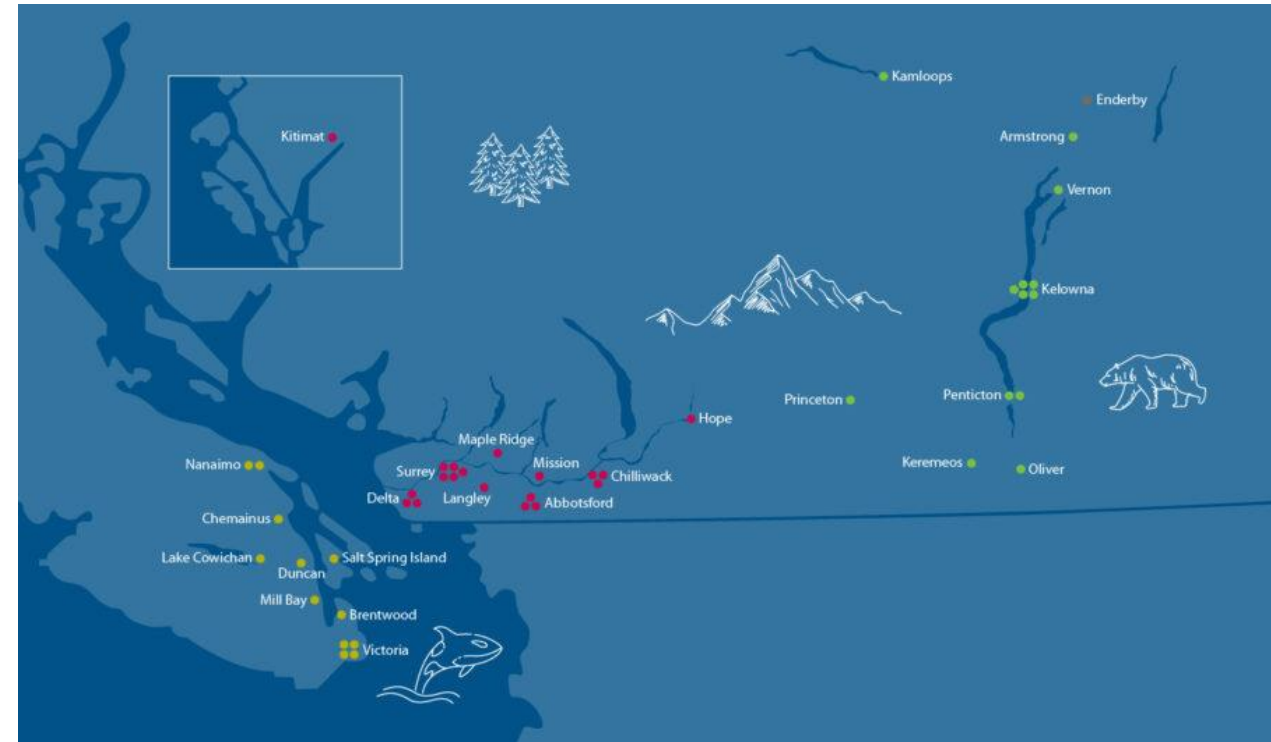
Partnerships that turn funding into lasting change

Guided by trust-based philanthropy, the Foundation partners with charitable organizations to strengthen resilience and create lasting social change. Granting aligns with key UN Sustainable Development Goals, including poverty reduction, food security, mental health and well-being, education, and reduced inequalities.

About First West Foundation

As the philanthropic partner of Tru Cooperative Bank (formerly First West Credit Union), the Foundation benefits from a unique model: the Cooperative Bank covers 100% of the Foundation's operating costs. This means every donated dollar goes directly to charitable impact — maximizing support for community-led solutions and amplifying the reach of each investment.

Since 1998, First West Foundation has awarded more than \$15 million in grants to charities across British Columbia. This Impact Report reflects both the depth of that legacy and the Foundation's continued commitment to helping communities not only meet today's needs, but thrive for generations to come.



Trust-Based Philanthropy: a collaborative journey

Trust-based philanthropy is rooted in a set of grantmaking practices centering **respect, partnership, and flexibility** between a funder and its charitable partners. It aligns with our belief that community organizations are best positioned to determine how funding can achieve **meaningful impact in their communities**.

In 2022, First West Foundation formally adopted this approach, moving away from restrictive funding, lengthy applications, and burdensome reporting requirements. Today, **trust-based philanthropy** is at the very heart of who we are and what we do.

In 2025, **\$1,947,365** was awarded as **unrestricted funding**, reducing administrative burden and allowing organizations to focus their resources where they are needed most.

By reducing administrative burden and offering longer-term, predictable funding, the Foundation enables its charitable partners to **plan sustainably**, respond to **evolving community needs**, and focus their time and resources on what matters most - **delivering impact in their communities**. This approach strengthens organizational resilience and ensures smaller organizations who may have fewer resources dedicated to grant-writing also have access to funding.

Trust-Based Philanthropy in Practice



Trust-Based Philanthropy : what it means to our partners

Big Sisters of B.C. Lower Mainland - "The application process and the trust-based philanthropic procedures implemented. The verbal report back system allows funders and recipients to discuss goals, successes, and challenges in an open and honest space. I especially like that we get to connect face to face when providing our impact. Thank you to the First West Foundation for all that you do to support our community. "

Volunteer Cancer Drivers Society - "Your process is highly respectful and takes a “partner” approach to the grant application process. We appreciate this very much. "

Cowichan Valley Youth Servies - "Trust-based philanthropy principles throughout the process offer nonprofit organizations incredible gifts of time and trust. "

The Centre for Epilepsy and Seizure Education - "Thank you for introducing this more simplified application process. It makes such a difference in time spent preparing the application."



Image courtesy of: Volunteer Cancer Drivers

Our Priority Impact Areas: Contributing to the Global Goals

As a charitable Foundation, we believe we have a role to play in helping achieve the global vision of peace and prosperity outlined by the United Nations Sustainable Development Goals. To maximize the impact of our granting, we align our Impact grants with key SDGs. In 2025, this is how we contributed to each of these goals:



No Poverty

\$148,000

9 organizations



Zero Hunger

\$175,000

9 organizations



Good Health & Well-being

\$608,676

35 organizations



Quality Education

\$178,000

14 organizations



Reduced Inequalities

\$592,680

31 organizations

2025 Impact at a Glance

\$2.25M

in grants disbursed

150

charities supported

12%

record regional endowment
disbursement rate

31

equity-deserving charities
received SOAR grants

\$23M+

in endowment
assets stewarded

\$2.01M

Valley First members establish a new family legacy endowment.

2025 – A record year for our granting

Stepping up in times of greatest need with a record 12% disbursement rate.

A 2025 report on the state of BC's non-profit sector highlights what our charitable partners know all too well – **demand for services is rising while financial resources are increasingly limited** across the province.

Recognizing the challenges faced by our communities, First West Foundation's Board of Directors approved a **record 12% disbursement rate** for its regional community endowments, the highest rate in the Foundation's history and more than double the Canadian Revenue Agency's minimum rate of 5%.

The Foundation's remaining endowments disbursed at rates between 5-10%, maximizing each individual endowment's capacity to support charitable investment.

Overall, in 2025, the Foundation disbursed a total of **\$2,252,765** through 18 endowments.

Source: Stretched Thin – 2025 State of BC's Non-Profit Sector, 2025, Vantage Point

Walking alongside our partners

Our strength and impact as a Foundation lies in our ability to be **flexible** in responding to the evolving needs of our community partners. For that reason, we offer two types of grants, **maximizing the impact** of our grants and allowing us to **walk alongside** our charitable partners on their journeys.

CAPACITY GRANTS

Capacity grants exist to strengthen local charities, providing them with financial resources to pursue education, professional development, training and infrastructure enhancements. Capacity grants are very hard to come by, and at a time of heightened economic challenge and uncertainty, First West Foundation is committed to investing in our partners' capacity, because we know that resilient charities are the backbone of resilient communities.

IMPACT GRANTS

Our impact grants support registered charities serving communities in ways that advance our priority Sustainable Development Goals: No Poverty, Zero Hunger, Good Health & Well-Being, Quality Education, and Reduced Inequalities. These grants are unrestricted, enabling partners to use the funding where it's needed most—because we trust them to know what will make the greatest difference in their communities.

Two grant types. One goal: resilient organizations delivering lasting community impact.

IMPACT GRANTS- unrestricted funding for targeted impact

Total \$1,159,176

through regional community endowments

2025 Impact Grants:

\$653,000 to charities serving the communities of our Envision Financial Community Endowment.

\$238,305 to charities serving the communities of our Valley First Community Endowment.

\$205,000 to charities serving the communities of our Island Savings Community Endowment.

\$62,871 to charities serving the communities of our Enderby Financial Community Endowment.

CAPACITY GRANTS- investing in community resilience

Total \$179,000

through regional community endowments

2025 Capacity Grants:

\$95,000 to charities serving the communities of our Envision Financial Community Endowment.

\$49,000 to charities serving the communities of our Valley First Community Endowment.

\$35,000 to charities serving the communities of our Island Savings Community Endowment.

Nourish Nanaimo: A Recipe for Resilience



First West Foundation has partnered with Nanaimo Community Kitchens Society (NCKS) since 2016. Nanaimo Community Kitchens promotes food security and nourishes the community through accessible cooking programs that foster skill development, knowledge sharing, friendship and self-esteem. In 2025, NCKS made a deliberate choice to pause and strengthen what happens behind the scenes so programs can keep meeting rising demand. The Foundation’s capacity grant enabled NCKS to examine their work and focus on sustainability during a challenging economic time.

A key priority was rebuilding fundraising after COVID disrupted NCKS’s annual Fall fundraiser. With capacity funding, the organization was able to dedicate staff time to relationship-building and fundraising. That investment paid off quickly: NCKS successfully re-launched a Fall fundraising event that brought together about **60 community members** for an interactive chef-led cooking experience. Beyond dollars raised, the evening expanded NCKS’s visibility and strengthened partnerships—planting seeds for future collaborations with local restaurants and community events.

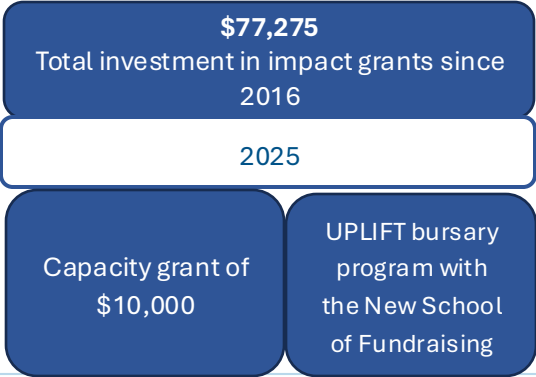
Nourish Nanaimo: A Recipe for Resilience (continued)



At the same time, the grant helped NCKS create a new earned-revenue and outreach tool: *Nourish Nanaimo*, a 250-page community cookbook. Recipes were developed through NCKS cooking workshops, and the book reflects the heart of NCKS’s work: food as connection, dignity and belonging.

Nearly all copies from the first print run have already sold. Next, the organization plans to pursue sponsorships so local businesses can help offset printing costs—growing the cookbook into an even stronger sustainability engine.

By investing in people—not just programs—this capacity grant strengthened the foundation behind NCKS’s work, expanding fundraising reach, increasing visibility and supporting long-term sustainability so the organization can continue meeting growing community needs.



Growing stronger to support mental health

Step Forward Health Society

Step Forward Health Society provides accessible, community based mental health programs, helping people in Delta – particularly women and youth - build connection, resilience and wellbeing.

First West Foundation’s partnership with Step Forward Health Society reflects a trust-based, flexible approach to funding. In 2024, the Foundation provided a \$25,000 impact grant to fund the creation of an online group program supporting women who have experienced abuse in intimate relationships. As community-demand for Step Forward Health’s services increased, the organization decided they were ready to grow. To support them with this goal, in 2025, First West Foundation followed this program investment with a \$10,000 capacity-building grant to improve fundraising knowledge, communications and operational efficiency.

With stronger foundations in place, they were better positioned to mobilize support, including through initiatives like the 2025 Move for Mental Health campaign, which brought together more than 130 people in support of accessible mental health services.



2024

Impact grant of \$25,000

2025

Capacity grant of \$10,000

UPLIFT bursary program with the New School of Fundraising

Investing internally to better serve



Hands in Service | Kelowna, 2025 Capacity Grant - \$10,000

In Kelowna, Hands in Service serves people who too often slip through the cracks—low-income and socially isolated individuals living with disabilities and health challenges. A capacity grant from First West Foundation provided something rarely available in the charitable sector: breathing room to step back, take stock, and strengthen the internal systems that make long-term community impact possible.

With that space to think and plan, Hands in Service brought in external expertise to take a close look at how the organization was structured and operated. Roles were clarified, responsibilities streamlined and overlap across staff work was reduced. The result was a noticeable shift in how the team operated—more efficient, more collaborative and able to do more without adding new positions. That stronger foundation quickly translated into more support for the community: expanded program delivery, more food hampers and home support services, and even the launch of new initiatives such as a crisis food program.

The grant also made it possible to invest in what sits at the heart of Hands in Service's work: its volunteers. With trauma-informed training and relationship-centered skills development, Brittani Stober, the organization's Executive Director, explains that volunteers are now better equipped to support vulnerable clients.

With these tangible results to point to, the organization is now building capacity investments into its core budget, committing to quarterly volunteer training and planning for strategic staffing. The impact is measured not only in rising service numbers, but in a more resilient organization - better positioned to serve.

UPLIFT- a bursary program in partnership with the New School of Fundraising

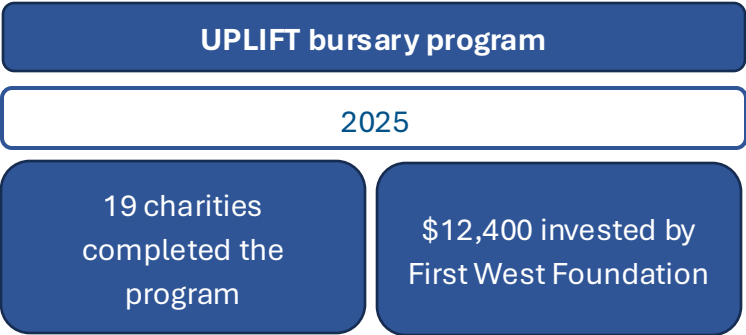


**THE NEW SCHOOL
OF FUNDRAISING**

uncommon education for community crusaders

The New School of Fundraising offers small group and individual training for professional fundraisers, board members, volunteers and passionate community members.

First West Foundation is proud to have launched the UPLIFT Program, in partnership with NSOF, a program designed to provide organizations with tailored support and training through a unique mix of consulting and training.



“We participated in the UPLIFT program, and some of our new fundraising ideas, like the recipe book and the Fall Fundraiser, came from connecting with Rowena through the New School of Fundraising.”
Heidi Sinclair, Executive Director, Nanaimo Community Kitchens Society

SOAR: addressing the funding gap



Literacy Alliance of the Shuswap Society, 2025



\$592,680

disbursed in 2025

31

local charities
supported

Indigenous charities, as well as Black-serving and black-led charities, are underfunded across Canada. To address this funding gap, in 2022 First West Foundation launched SOAR, a grant program to support and partner with organizations led by and/or committed to serving racialized groups, including and not limited to people who identify as Black, Brown or Indigenous, in communities served by Tru Cooperative Bank.

In 2025, \$592,680 was disbursed to 31 local equity-deserving charities through the SOAR grant program.

Source: Redsky, Brascoupe, Blumberg, Lang, August 2022, Canadian Charity Law; Unfunded: Black Communities overlooked by Canadian Philanthropy, Carleton University, 2021

SOAR: addressing the funding gap

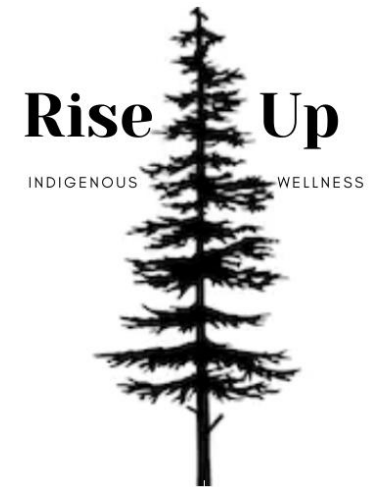
Indigenous Elders in Tech Program: A partnership for “Friendraising” and Fundraising

In partnership with Rise Up Indigenous Wellness, Literacy Alliance of the Shuswap Society (LASS) connects Indigenous youth and Indigenous Elders through one-on-one tech mentorship. The program is powered by a committed Indigenous young adult supporting Elders with technology – a powerful reminder that **one motivated person, showing up consistently, can create real change.**



The first session focuses on fundamentals, to build confidence. Follow-up sessions become more individualized: listening closely, troubleshooting specific issues. In Rise Up Indigenous sessions, food and connection are as important as the technology, with gatherings being patient and conversational, making space for being present, sharing stories and listening to Elders.

Launa, member of Xa'xtsa First Nation and Indigenous Educator at Rise Up Indigenous, captures that spirit: “We’re better at friendraising than fundraising, but we’re getting the hang of it.” Thomas Briginshaw, Executive Director of LASS echoes the commitment behind the partnership: “We know it can be much harder to secure grants without charitable designation, and we’re proud to support Rise Up Indigenous’ mission however we can.”



First West Foundation’s impact grant supported more than a program—it strengthened a partnership between two organizations committed to helping Elders connect with technology and with one another. Building on their work in 2025, they have now secured federal funding through March 2027, so they can deepen their collaboration and expand opportunities for Elders to connect, learn and feel confident in the digital world.

Employee Giving- our partnership with Tru Cooperative Bank

“When I joined the Tru Cooperative Bank Team in 2025, I was amazed to discover all of the truly worthy causes supported by First West Foundation. Knowing that my contributions go to organizations that support communities that matter to me, such as Indigenous Youth, Hospice Care and Eldercare Services, makes me grateful to have such a considerate employer whose values align with my own.”

Empowering Change Every Payday

Every pay day, Tru Cooperative Bank Team Members empower change in their communities, by giving through our Payroll Giving Program. From as little as \$1 a pay day, Team Members contribute to the charities and causes they want to support, and the cumulative impact of their generosity is tremendous.

Scaled Approach- Local Focus

As Tru Cooperative Bank has grown over the years, with the joining of Envision Financial, Valley First, Island Savings and Enderby & District Financial, its partnership with First West Foundation has helped to scale and sustain its approach to charitable giving, while still maintaining a focus on local communities and needs. First West Foundation supports this generosity by providing flow through grants, with 100% of donations going directly to charitable partners.

We know the causes and communities our Team Members hold dear are as varied as they are, which is why they can choose to give to any First West Foundation endowment, Signature Cause food bank partners and Payroll Giving charitable partners.



Meghan Cairns
Marketing Manager
Tru Cooperative Bank

A little every payday goes a long way – 2025 payroll giving

\$86,443

total employee giving in 2025

First West Foundation Endowments	\$20,921	United Way BC	\$1,263
BC Children’s Hospital Foundation	\$15,432	Side by Side Children’s Village Society	\$432
BC Cancer Foundation	\$4,251	White Valley Community Resource Center	\$21
Fraser Valley Gleaners	\$416	Tillicum Adult Learning Centre	\$624
Hope Association for Community Living	\$624		
Signature Cause Food Bank Partners	\$42,459		



Since Winter 2025, we are proud to include the Fraser Region Aboriginal Center Association (FRAFCA), Victoria Native Friendship Centre and Ki-Low-Na Friendship Society as our charitable partners for our Payroll Giving Program.

Supporting Tru Cooperative Bank's Signature Causes Feed the Valley and The Full Cupboard

Through our Payroll Giving Program, First West Foundation is proud to support Tru Cooperative Bank's Feed the Valley and The Full Cupboard, a movement which began in 2010, designed to support local food banks in communities across Tru Cooperative Bank. Tru Cooperative Bank team members give generously each year, helping to increase access to food while also addressing the root causes of food insecurity in our province.

"Every day, food banks across BC welcome families who are working hard but still struggle to make ends meet. Last month, our network reported over 181,000 visits to their food banks – a number that continues to grow. Hunger Action Month shines a light on those realities and reminds us of the power of community. With the support of our partners like First West Foundation, we can turn generosity into action – ensuring that nutritious food reaches those who need it most."

Nick Johnson, Manager of Member Services at Food Banks BC



Donations made to Feed the Valley and The Full Cupboard partners via Payroll Giving supported the following food banks:

Archway Food Bank	\$3,131
Friends in Need Food Bank	\$442
Hope Food Bank	\$645
Kitimat Food Bank	\$1,776
St. Joseph's Food Bank (Mission)	\$2,427
Salvation Army Chilliwack Community	\$2,705
SHARE Family & Community Services	\$1,248
South Delta Food Bank	\$1,867
Sources Langley Food Bank	\$948
Sources South Surrey/White Rock	\$1,657
Surrey Food Bank	\$3,016
Armstrong Food Bank	\$1,246
Central Okanagan Food Bank	\$4,574
Kamloops Food Bank	\$1,008
Lumby Food Bank	\$165
Oliver Food Bank	\$468
Peachland Food Bank	\$78
Princeton Food Bank	\$358
Salvation Army Cawston/Keremeos	\$330
Salvation Army Penticton Food Bank	\$5,993
Salvation Army Vernon Food Bank	\$228

Feed Enderby & District Food Bank	\$273
CMS Food Bank Society (Mill Bay)	\$78
Chemainus Food Bank	\$962
Cowichan Valley Basket Society (Duncan)	\$2,250
Goldstream Food Bank (Langford)	\$390
Ladysmith Food Bank	\$253
Lake Cowichan Food Bank	\$221
Mustard Seed Food Bank	\$2,136
Nanaimo Loaves & Fishes Food Bank	\$565
Saanich Peninsula Lions Food Bank	\$245
Salt Spring Island Food Bank	\$417
Sooke Food Bank Society	\$234
Greatest Need Food Bank*	\$125

*Donations to the 'Greatest Need Food Bank' support food banks with emergent needs or when fundraising donations are low.

Our Community Partners

First West Foundation’s four regional community endowments are central to our grant-making work, allowing us to provide grants to charities addressing complex social issues across British Columbia.

Envision Financial Community Endowment

The Foundation’s first and largest endowment, established in 1996, generates annual grants for charities serving the communities of Envision Financial, which include Abbotsford, Chilliwack, Delta, Hope, Kitimat, Langley, Maple Ridge, Mission and Surrey.

In 2025, the Envision Financial Community Endowment released **\$1,130,080 of grants to 56 charitable partners.**

Impact Grant Recipients: Total of \$653,500

Abbotsford Youth Commission, Abbotsford, \$25,000	M2/W2, Abbotsford, \$25,000
BC Agriculture in the Classroom, Abbotsford, \$25,000	Mackie’s Place Youth Social House, Surrey, \$50,000
BeMorr Society Mental Health and Suicide Awareness, Abbotsford, \$25,000	Mission Community Services Society – Dunsmuir Neighbourhood Association, Mission, \$25,000
Crisis Intervention and Suicide Prevention, Across BC, \$25,000	Mission Literacy in Motion, Mission, \$3,000
Delta Hospital and Community Foundation, Delta \$25,000	Mothers Against Drunk Drivers, Envision Financial region, \$5,000
Elizabeth Fry Society of Greater Vancouver, Delta and Surrey \$25,000	Nightshift Street Ministries, Surrey, \$25,000
EmotionsBC Health and Wellness, Surrey, \$25,000	Rick’s Heart Foundation, Fraser Valley, \$20,000
Food for the Soul Project Society, Maple Ridge, Abbotsford, \$25,000	Ridge Meadows Child Development Centre, Maple Ridge, \$15,000
Fraser Region Community Justice Initiatives, Langley, \$20,000	Spinal Cord Injury of BC, Fraser Valley, \$5,000
HeadsUp Guys, Envision Financial region, \$25,000	Surrey Hospitals Foundation, Surrey, \$500
Heron Hospice Society, Delta, \$20,000	Surrey-North Delta Meals on Wheels, North Delta, \$15,000
Kitimat General Hospital Foundation, Kitimat, \$25,000	Take a Hike Youth Mental Health Foundation, North Delta, \$25,000
L.I.N.C. (Long-term Inmates Now in the Community), Mission, \$25,000	Union Gospel Mission, Langley, \$25,000
Langley Meals on Wheels, Aldergrove, \$25,000	Volunteer Cancer Drivers Society, Surrey, \$25,000
LIFE Recovery Association, Abbotsford, \$25,000	Wagner Hills Farm Society, Langley, \$25,000



Envision Financial Community Endowment (continued)

Capacity Grant Recipients: Total of \$95,000

- Autism Support Network Society, Envision Financial region, \$10,000
- Hope Mountain Centre for Outdoor Education, Hope, \$10,000
- Ishtar Women's Resource Society, Langley, \$15,000
- Langley Animal Protection Society Langley, \$10,000
- Langley Senior Resources Society, Langley \$10,000
- Lumara Grief and Bereavement Care Society, Envision Financial region, \$10,000
- National Family Support and Restoration Society, Mission, \$10,000
- Step Forward Health Society, Delta, \$10,000
- Surrey Cares Community Foundation, Surrey, \$10,000

UPLIFT Bursary Program Recipients: \$4,900

- Abbotsford Police Foundation, \$700
- BeMorr Society Mental Health & Suicide Awareness, \$700
- Heron Hospice Society, \$700
- Surrey-North Delta Meals on Wheels, \$700
- Running on Faith Project, \$700
- The Centre for Epilepsy and Seizure Education in BC, \$700
- Volunteer Cancer Drivers Society, \$700

SOAR Grant Recipients: Total of \$376,680

- Association of Neighbourhood Houses, Surrey/White Rock, \$25,000
- Big Sisters of BC Lower Mainland, Surrey and Delta, \$25,000
- EmpowerED Support Society, Hope, \$25,000
- Feels like Home Newcomers Society, Surrey, \$25,000
- First Nations Emergency Service Society of BC, Envision Financial region, \$10,000
- Fraser Region Aboriginal Friendship Centre Association, Surrey \$15,000
- Fraser Valley Health Care Foundation, Abbotsford, \$25,000
- Leave Out Violence (LOVE) Society, Fraser Valley, \$35,000
- MOSAIC, Fraser Valley, \$25,000
- Qmunity, Fraser Valley, \$25,000
- Reach Child and Youth Development Society, Delta, \$25,000
- Seabird Island Band, Fraser Valley, \$25,000
- SHER Vancouver, Delta, \$10,000
- Technology for Living, Envision Financial region, \$25,000
- The Centre for Epilepsy and Seizure Education in BC, Abbotsford, \$9,680
- Thrive-4-Blacks Community Services Society, Surrey, \$25,000
- UNITI, The Semiahmoo Foundation, Surrey, \$22,000



Island Savings Community Endowment

This endowment was established in 2016, and supports organizations serving communities in the Island Savings region, including Brentwood Bay, Chemainus, Duncan, Lake Cowichan, Mill Bay, Nanaimo, Victoria, and Salt Spring Island.

In its ninth year of granting, the Island Savings Community Endowment disbursed \$342,800 to 25 charities.

Impact Grant Recipients: Total of \$205,000

- 1000 X 5 Children’s Book Recycling Project Society, Victoria, \$15,000
- Circular Farm and Food Society, Victoria, \$15,000
- Cowichan Valley Youth Services, Duncan, \$15,000
- Crisis Intervention & Public Information Society of Greater Victoria, Victoria, \$10,000
- Greater Victoria Citizens’ Counseling Centre, Victoria, \$15,000
- Nanaimo Volunteer and Information Centre, Nanaimo, \$10,000
- Parkinson Wellness Projects, Victoria, \$15,000
- Peninsula Streams Society, North Saanich, \$10,000
- Salt Spring Island Farmland Trust, Salt Spring Island, \$15,000
- Take a Hike Youth Mental Health Foundation, Nanaimo, \$10,000
- The Circle Salt Spring Education Society, Salt Spring Island, \$15,000
- The Men’s Centre, Nanaimo, \$15,000
- Victoria Brain Injury Society, Victoria, \$15,000
- Victoria Community Food Hub Society, Victoria, \$15,000
- Victoria Literacy Connection Society, Victoria, \$15,000

Capacity Grant Recipients: Total of \$35,000

- Mental Health Recovery Partners Society, Victoria, \$15,000
- Nanaimo Community Kitchens Society, Nanaimo, \$10,000
- Operation Freedom Paws Canada, Island Savings region, \$10,000

SOAR Grant Recipients: Total of \$100,000

- Cowichan Valley Intercultural and Immigrant Aid Society, Duncan, \$15,000
- Human-Nature Counselling Society, Victoria, \$15,000
- Inter-Cultural Association of Greater Victoria, Victoria, \$15,000
- Raincoast Conservation Foundation, Victoria, \$10,000
- Restorative Justice Victoria, Victoria, \$15,000
- Victoria Immigrant and Refugee Centre Society, Victoria, \$15,000
- Victoria Native Friendship Centre, Victoria, \$15,000

UPLIFT Bursary Program Recipients: \$2,800

- Cowichan Valley Basket Society, \$700
- Cowichan Valley Youth Services, \$700
- Funding for Life Society, \$700
- Nanaimo Community Kitchens Society, \$700



Valley First Community Endowment

The Valley First Community Endowment was established in 2012 to support charities in the Okanagan, Thompson and Similkameen regions, which includes the communities of Armstrong, Kamloops, Kelowna, West Kelowna, Keremeos, Oliver, Penticton, Princeton and Vernon.

In 2025, a total of **\$381,505** was granted through the Valley First Community Endowment to 28 charities.

Impact Grant Recipients: Total of \$238,305

Archway Society for Domestic Peace, Vernon, \$15,000
Canadian Mental Health Association Vernon & District, Vernon, \$15,000
Centre for Epilepsy & Seizure Education in BC, Central Okanagan, \$13,305
Dress for Success, Kelowna, \$15,000
Open Door Group, Kamloops, \$15,000
Haugen Community Healthcare Society, Armstrong, \$5,000
Kelowna Community Resources, Kelowna, \$15,000
Launch Financial Education Society, Kelowna, \$15,000
Modern Man Family Project, Kamloops, \$20,000
Mothers Against Drunk Drivers, Valley First region, \$5,000
North Okanagan Community Life Society, Vernon, \$15,000
North Okanagan Hospice Society, Vernon, \$10,000
Okanagan Fruit Tree Project Society, Kelowna, \$15,000
Project Literacy Central Okanagan Society, Kelowna, \$10,000
South Okanagan Women in Need Society, Penticton, \$15,000
Take a Hike Youth Mental Health Foundation, Valley First region, \$10,000
Third Space Charity, Kelowna, \$15,000
YMCA of Southern Interior BC, Kelowna, \$15,000

Capacity Grant Recipients: Total of \$49,000

Elizabeth Fry Society, Kamloops, \$5,000
Hands in Service, Kelowna, \$15,000
Oasis United Church, Penticton, \$9,000
Penticton Community Soupateria Society, Penticton, \$10,000
Vernon Upper Room Mission Society, Vernon, \$10,000

SOAR Grant Recipients: Total of \$90,000

Kamloops Sexual Assault Counselling Centre Society, Kamloops, \$15,000
Ki-Low-Na Friendship Society, Kelowna, \$15,000
Niteo Africa Society, Kelowna, \$15,000
OCCA Communities Association, Kelowna, \$15,000
This Space Belongs to You Society, Kelowna, \$15,000
Vernon and District Immigrant and Community Services, \$15,000

UPLIFT Bursary Program Recipients: \$4,200

Oasis United Church, \$700
OCCA Communities Association, \$700
Penticton Centre for Exceptional Learning, \$700
South Okanagan Loss Society, \$700
South Okanagan Recope Society, \$700
This Space Belongs to You, \$700



Enderby Financial Community Endowment

Founded in 2014, the Enderby Financial Community Endowment supports local charities serving the community of Enderby and Area F of the North Okanagan Regional District.

In 2025, through our Enderby Financial Community Endowment, we distributed **\$88,871 to 5 charities** in these areas.

Impact Grant Recipients: Total of \$62,871

A.L. Fortune Secondary School, \$15,000

Enderby and District Community Resource Centre, \$19,871

Kingfisher Interpretive Centre, \$10,000,

Literacy Alliance of the Shuswap Society, \$15,000

Mothers Against Drunk Drivers, \$3,000

SOAR Grant Recipients: Total of \$26,000

Literacy Alliance of the Shuswap, Enderby & area, \$26,000



EMPLOYEE NOMINATED

Envision Financial Employees' Endowment

Grown from donations collected in the Envision Financial region, the Envision Financial Employees Endowment provides grants to charities nominated and selected by Envision Financial team members.

In 2025, **\$41,000** was disbursed to **10** recipients.

Ann Davis Society, Chilliwack, \$5,000

Canadian Council of Provincial and Territorial Sport Federations, Surrey, \$1,000

Mackie's Place Youth Social House, Surrey, \$5,000

Raphael Family Support Foundation, Langley, \$5,000

SPCA Abbotsford, \$1,000

SPCA Chilliwack, \$1,000

Storehouse Community Hub Society, Cloverdale, \$5,000

Surrey Women's Centre, Surrey, \$8,000

Volunteer Cancer Drivers Society, Fraser Valley, \$5,000

West Coast Kids Cancer Foundation, Envision Region, \$5,000



Tru Cooperative Bank Leaders' Fund

Established in 2015, the Leaders Fund provides grants for organizational capacity and professional development . In 2025, the Fund granted **\$84,500 to 10 charities** across Tru Cooperative Bank's communities.

Envision Financial Communities: \$24,500

Mission Hospice Society, \$5,000

Sardis Doorway Society, Chilliwack, \$4,500

Surrey Hospitals Foundation, Surrey, \$10,000

Vantage Point, Fraser Valley, \$5,000

Island Savings Communities: \$40,000

Cowichan Green Community Foundation, \$10,000

Ladysmith Family and Friends, Ladysmith, \$10,000

Nanaimo Brain Injury Society, Nanaimo, \$10,000

Saanich Neighbourhood Place, Victoria, \$10,000

Valley First Communities: \$20,000

Discovery House, Penticton, \$10,000

Alert Canada, Valley First region, \$10,000

Keeping a Good Thing Growing Endowment

Established by Tru Cooperative Bank in 2022, through this endowment, we invest in our charitable partners' growth and future goals. Keeping a Good Thing Growing funds initiatives that take an organization to the next level, enhancing their capacity, or expanding their programs or services.

Three grants were released under this endowment in 2025, totaling **\$76,490**.

In our Envision Financial Region:

First Nations Health Foundation, BC-wide, \$26,490

In our Valley First Region:

Interior Community Services, Kamloops, \$25,000

Canadian Mental Health Association, Vernon, \$25,000

Named Endowments

First West Foundation is proud to help our members achieve their philanthropic goals and establish a legacy of giving to a charity of their choice. The Foundation’s Named Endowments benefit the following charities:

Anonymous Fund

Fraser Valley Health Care Foundation, \$9,684

Ben H. Voth Legacy Fund

Construction Foundation of BC, \$1,880

Dewar Family Legacy Fund

Children's Heart Network of BC Society, \$300
Movember, \$325
Victoria Hospitals Foundation, \$3,400

Frank Jamieson Memorial Fund

Chilliwack Curling Club High School Bursary,
\$1,200

Gord & Enrica Huston Fund

BC Cancer Foundation, \$2,471

Haukeland Family Legacy Fund

Watoto Canada, \$1,092
MS Society of Canada, \$1,127.50
BC Lupus Society, \$1,127.50

Mark Warawa Legacy Fund

Nicomekl Enhancement Society, \$545

Peter Bell Legacy Fund

Enderby & District Community Resource Centre Society, \$53,070

Peter Podovnikoff Scholarship Fund

Kwantlen Polytechnic University Foundation, \$6,054

Sally O’Sullivan Legacy Fund

Side By Side Children’s Village Society, \$1,397

Side-By-Side Children’s Village Society Fund, \$17,846

Preparing to serve more communities across Canada

2026 marks a new beginning for First West Foundation, as we join Tru Cooperative Bank on its Federal Journey and prepare to adopt a new name – Tru Charitable Foundation - to align with our main partner and better reflect who we are as an organization today.

As Tru Cooperative Bank ventures beyond British Columbia to serve new and existing members, First West Foundation will walk alongside to provide philanthropy in new communities in B.C. and across Canada. We look forward to forming new partnerships with charities helping communities thrive across our country.

As we prepare to further scale our work, we carry with us the principles of trust-based philanthropy and our deeply-rooted commitment to supporting local solutions to meet community needs wherever we go.



Thank you to our Donors

Your generosity and commitment to our communities make all that we do possible!

Thank you to our donors and community partners.

First West Foundation

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First West Foundation is grateful every day for the privilege of working and serving its communities on the unceded, ancestral, and traditional territory of Coast Salish peoples, specifically the S'ólh Téméxw (Stó:lō), Nuxwsa'7aq (Nooksack), Kwantlen, šxʷməθkʷəy'əməʔtəməxʷ (Musqueam), Stz'uminus, sq'əc'iy'aʔtəməxʷ (Katzie), Nl̓eʔkepmx Tmíxʷ (Nlaka'pamux), Semiahmoo, scəwaθenaʔtəməxʷ (Tsawwassen), Á,LEÑENEŁŁTE (W̱SÁNEĆ) and xà'isla w'áwís (Haisla).