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# When it's important to our communities, it's personal to us.

*ScotiaMcLeod,® a division of Scotia Capital Inc.*

Since 1987, The ScotiaMcLeod Charitable Foundation has played a vital role in supporting the culture of philanthropy at ScotiaMcLeod®. Now in its third year, the Share the Wealth program is preparing to issue its next round of donations this October — and it's looking like a record year.

Originally established to celebrate the brokerage McLeod Young Weir joining Scotiabank, over the last 30 years the ScotiaMcLeod Charitable Foundation ("the Foundation") has become a means to support the inherent culture of giving back, by encouraging and recognizing the ongoing participation of ScotiaMcLeod staff in community involvement. Through contributions to registered charities across Canada, the Foundation celebrates their participation in their community, in the areas that are most important to them.



Share the Wealth was conceived as a way to celebrate the philanthropic efforts of employees by connecting everyone across the organization who contributes their time and exhibits leadership in their volunteerism. Where an employee demonstrates significant impact, the program enables the Foundation to give back through a fair and considered process. "We wanted to find a way to connect all the initiatives that people are involved in outside of the office," said ScotiaMcLeod Portfolio Manager and Director, Wealth Management Rob Gray, who is also the Foundation Board Chair. "Now we're working to create sustainable ways to grow the program to support the charities that our teams are most passionate about, and most intimately involved in."

From year to year, the program continues to gather more momentum. In 2016, eight grants were donated to a variety of local and national charities from housing programs to hospitals, help for the homeless and programs for youth. Recipients of these were all nominated by our staff from different roles across ScotiaMcLeod, who've become contributors to these deserving causes. "People are involved with these charities because they're a part of their lives — it's personal. They've had a family member with Parkinson's; they've got a friend who has survived cancer, and they're contributing because they want to be a part of a better future," said Gray. This year, through the efforts of advisors and their colleagues, contributions to the Foundation have surpassed \$800,000, enabling the Board to distribute more awards than ever before. *(continued on next page)*

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“We’re excited by the momentum we’ve seen so far. The nominations close in July, and we’re expecting more than 50 this year. We’re aiming to select around 25 recipients and last year’s recipients are now the judges of this year’s nominees,” said Carl Spiess, ScotiaMcLeod Portfolio Manager and Director, Wealth Management, along with being the Foundation Treasurer and organizer of the selection panel for the recipients.

Rob Djurfeldt, Managing Director of ScotiaMcLeod, is a firm believer of the importance of celebrating community involvement. “Giving back is a core value for us, and we encourage members of our team to embrace opportunities to participate and get involved. The ScotiaMcLeod Charitable Foundation and Share the Wealth program allow us to support and recognize the commitments of our team members.” Our advisors are empowered to manage the key components that drive the Foundation’s many initiatives, including major fundraising events. The most recent of these was at a successful advisor-led conference in Halifax, Nova Scotia, attended by representatives from ScotiaMcLeod and our partner firms, featuring the stories of recipients from prior years. “It was a great success and the perfect opportunity to promote the program,” Spiess reflected, “We’ll be able to do more this year than we have before, and will hopefully have even more contributors next year. It started as a ripple, and is becoming a wave.”