

# Living Our Values

It isn't just about how we invest—it's also about how we operate as an organization. We are pleased to share some of our ongoing initiatives and showcase a few of this year's notable achievements.

## Burgundy at a Glance\*



**147**

Number of employees



**41**

Average employee age



**83%**

Shareholder percent



**33**

Number of countries of origin (employees)



**4**

Employee locations: Toronto, Montreal, Vancouver, and Tokyo

\*As at December 31, 2024.

## Philanthropy & Community

As highlighted in prior reports, Burgundy’s longstanding tradition of giving permeates the culture of the firm. Our employees lend both their time and skills to support causes close to their hearts, volunteering with various charitable organizations and at community events. Burgundy further supports the philanthropic efforts of our people through our employee donation matching program, an initiative that allows Burgundy employees to amplify their personal contributions to the causes that matter most to them. In 2024, 55% of employees participated in Burgundy’s Donation Matching Program.

### SHARING EXPERTISE AND SHAPING FUTURES

At Burgundy, we believe in sharing our knowledge and expertise to empower communities with opportunities they might not otherwise have, inspiring students to explore careers in business and finance through accessible education. We are working to achieve this through a few important initiatives.

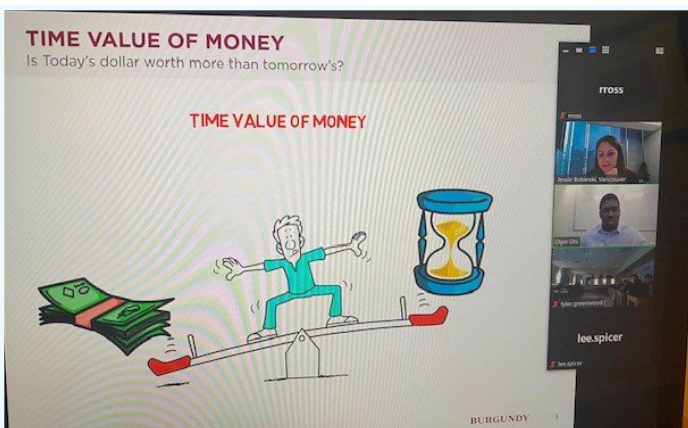
**Connected North:** Through our partnership with [Connected North](#), a program that connects students in remote areas with global learning opportunities via technology, and TakingITGlobal, which empowers youth with education and skills, Burgundy designed the personal finance course “How to Think Like a Business Owner.” This year, Burgundy team members hosted the course at four Indigenous schools across Canada, covering key concepts such as equity, borrowing (good debt vs. bad debt), and entrepreneurship.

**Junior Achievement:** This past spring, Burgundy employees continued our work with [Junior Achievement \(JA\)](#), an organization dedicated to empowering youth with the skills and confidence they need to succeed. Burgundy team members spent a day in local classrooms teaching Grade 7 students financial basics through JA’s “Dollars with Sense” program, reaching 150 students and providing them with essential financial literacy skills.



### ADDITIONAL HIGHLIGHTS:

- **Engagement workshops:** Burgundy hosted a Quality/Value Investment workshop with the [GEM \(Girls Early Mentorship\)](#) program, showcasing skills and career opportunities in asset management.
- **Women in Investing:** Burgundy’s Women in Investing Club marked its sixth year.
- **Scholarships:** Burgundy awarded monetary scholarships to the [Ozija Thiha Education Trust](#), [Onion Lake Education Trust Fund](#), and the Girls Early Mentorship Program. Additionally, Burgundy contributed to nursing scholarships through the Bethany Care Foundation.
- **Up the Down Stock Competition:** Burgundy participated in this Bay Street fundraiser supporting the [Down Syndrome Foundation](#).
- **Habilitas Foundation:** Burgundy donated \$12,000 to the [Habilitas Foundation](#), which works with individuals of all ages living with physical disabilities and sensory impairments.



### COMMUNITY ENGAGEMENT HIGHLIGHTS

Throughout the year, numerous Burgundians ventured out into the community to participate in charitable initiatives.

**Why We Ride:** As in past years, Burgundians took to the streets to participate in the largest cycling fundraiser in Canada. In June, a team of 36 Burgundy employees took part in the 2024 Ride to Conquer Cancer. With their own fundraising, and thanks to support from Burgundy’s Co-Founder Richard Rooney, the team raised over \$600,000 on behalf of [Princess Margaret Cancer Foundation](#). As Burgundy’s Head of People and Talent, highlights, “The Ride to Conquer Cancer is not just an event. It’s a transformative experience that redefines team building. It’s a secret recipe for creating a cohesive, resilient, and inspired team, ready to face any challenge together.”



Burgundians were also involved in several other fundraising and volunteer activities throughout the year. Organizations supported through these efforts included:

- [Canadian Cancer Society](#)
- [Cystic Fibrosis Canada](#)
- [St. Michael’s Hospital](#)
- [Make-a-Wish Canada](#)



#### Tree Canada:

In the spring, a group of Burgundy employees, armed with shovels and buckets of mulch, spent a couple of hours at a sloping planting site in Markham, Ontario, where they helped plant over 100 trees. This event was in collaboration with [Tree Canada](#), a non-profit dedicated to improving the environment by planting trees across Canada.






## An Update from the BLF— Our Private Giving Program

The [Burgundy Legacy Foundation \(BLF\)](#)  was established in 2020 as a platform for philanthropy. The mission of the BLF is to inspire a better world by advancing philanthropy and supporting the generosity of Burgundy’s employees, clients, and company. Through this platform, we aim to promote and facilitate philanthropic endeavours that align with the values of Burgundy, rooted in the fundamental principles of responsibility, knowledge, and community.

In 2023, the BLF introduced a Private Giving Program. Comprised of a donor-advised fund (DAF) platform, the Private Giving Program provides a simple and convenient way for Burgundy clients to meet their philanthropic needs and interests. To learn more about the BLF and its Private Giving Program, visit the foundation’s website and keep an eye out for the 2024 report coming this spring.

### 2024 BURGUNDY BALL

This year, we introduced a new initiative at our holiday party in Toronto, where each guest received a token upon check-in to choose a recipient charity, allowing them to participate in the spirit of giving. Through the Burgundy Legacy Foundation, donations were directed to three Canadian charities addressing today’s most urgent needs: mental health support through the [Canadian Mental Health Association \(CMHA\)](#) , poverty relief through [Food Banks of Canada](#) , and support for children through the [Breakfast Club of Canada](#) .



## Event Spotlight: Minerva Summit

On October 29, 2024, we hosted our second annual Minerva Summit, where the Women of Burgundy community gathered to discuss a topic garnering a lot of attention these days: the healthspan-lifespan gap. This gap, which disproportionately affects women, highlights challenges in managing health and financial needs. During the event, experts in psychology, healthcare, investing, financial planning, long-term care planning, and philanthropy offered their insight into this complex and evolving area.



Stay tuned for the eighth issue of [Minerva magazine](#)  this spring to explore the insights from this event.

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