


# Madiro Prospecting Chart (Summer 2024)

## July 22, 2024

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	6 – Prospect of Interest	

RT	AF	Prospect Name	Background	Financials & Giving
10	10	<p>Nanji Family / The Nanji Family Foundation</p> <p><u>Webpage:</u> <a href="https://www.nanjifamilyfoundation.com/">https://www.nanjifamilyfoundation.com/</a></p> <p><u>Contact:</u></p> <p>Gulshan and Pyrali G. Nanji’s daughter may be the best contact to engage. Nimi Nanji-Simard is based in Montreal and is identified in a number of sources as a Director with the family’s foundation.</p> <p>Nimi’s contact details are available in the following sites: Her dedicated website related to her luxury scarf business: <a href="https://niminimi.ca/who-is-nimi/">https://niminimi.ca/who-is-nimi/</a> Instagram: <a href="https://www.instagram.com/niminimiscarves/reel/s/">https://www.instagram.com/niminimiscarves/reel/s/</a></p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li><b><u>The Nanji family has strong connections to Africa; they immigrated to Canada from Uganda in 1972; arriving in Montreal originally. Gulshan and Pyrali Nanji are now based in Toronto.</u></b></li> <li>The Nanji family has a strong track record of <b><u>supporting healthcare.</u></b></li> <li>The gift announcement (on the \$1M gift to the UNHCR) <b><u>outlines the Nanji commitment to giving to international causes and how being a refugee shaped this approach.</u></b></li> </ul>	 <p><i>Gulshan and Pyrali G. Nanji</i></p> <p>The Nanji Family Foundation is a philanthropic organization dedicated to making a positive and lasting impact in society. Committed to the values of compassion, innovation, and collaboration, the foundation supports a wide range of charitable initiatives in areas such as education, healthcare, arts and culture, and social welfare. With a focus on empowering individuals and communities, strives to create meaningful change and contribute to a better world for all.</p> <p>The Nanji Family:</p> <p>In 1972, the Nanji family, along with 60,000 other Ugandans of mostly South Asian lineage, were given 90 days to leave their country. Uganda’s then-leader, the despot Idi Amin, decreed that while the country had long been their home, they were “bloodsuckers” and no longer welcome. Pyrali Nanji, his wife, Gulshan, and their four children were among the thousands exiled, stripped of citizenship and left with only their packed suitcases. After arranging mercy flights for the Nanji family and countless other Ugandan refugees to Montreal, the Canadian government gave them sanctuary. The Nanji family never forgot this country’s humanitarian gesture and pledged to pay it forward when it had the means to do so. They went on to prosper in logistics and packaging in Montreal and Toronto, and have paid it forward through the Nanji Family Foundation, which has given millions to hospitals, post-secondary educational institutions and museums.</p>	<p><u>Foundation:</u></p> <p>The Gulshan &amp; Pyrali Gulamali Nanji Family Foundation is not a registered charity with CRA. Also, the foundation not found in GrantConnect Nimi Nanji-Simard is identified as a Director of the family Foundation in various social media posts.</p> <p><u>Giving:</u></p> <p>The Gulshan and Pyrali G. Nanji Family Foundation:</p> <ul style="list-style-type: none"> <li>\$5M-\$9.9M to Sunnybrook Health Sciences Centre Foundation (Cumulative, 2015)</li> </ul> <p>Gulshan and Pyrali G. Nanji:</p> <ul style="list-style-type: none"> <li>\$1M-\$9.9M to North York General Hospital Foundation (2015)</li> </ul> <p><u>Notable Gifts:</u></p> <p>Select Transformational Gifts from Nanji Family:</p> <p>Seneca College:</p> <ul style="list-style-type: none"> <li>In November 2022, the Nanji Foundation provided Seneca with the largest gift in the college’s history. While the amount remained confidential, the Nanji Foundation made a multi-million-dollar contribution to Seneca’s School of Nursing to support financial aid, simulation technology and community engagement.</li> <li>To celebrate the Nanji Foundation’s generosity, Seneca has renamed the School of Nursing to the Seneca Nanji Foundation School of Nursing. It is the first Seneca school to be named in honour of a donor, reflecting the exceptional support the gift will provide to students and the impact it will have on healthcare for all Canadians.</li> </ul>

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		<ul style="list-style-type: none"> <li>The Nanjis are considered <b>entrepreneurs</b> in the packaging sector.</li> <li>The best contact to engage the Nanji family is by contacting the daughter – <b><u>Nimi Nanji-Simard – who is based in Montreal and describes herself as a fashion entrepreneur.</u></b></li> </ul>	<p><u>Gift Announcement:</u></p> <p><b>Refugee family makes \$1 million gift to UNHCR as they commemorate their 50 years in Canada</b>  <i>UNHCR Press Release, Apr 14, 2022</i></p> <p>Nanji Family Foundation commemorates 50th anniversary of South Asian exile from Uganda by providing over 50 young refugees with tertiary scholarships through UNHCR’s Aiming Higher campaign.  TORONTO – The Nanji Family Foundation is granting funds to UNHCR, the UN Refugee Agency, for tertiary education scholarships in support of its Aiming Higher campaign. This generous financial contribution will help provide sorely needed financial support to refugees pursuing higher education by funding scholarships for health-related university studies in their countries of asylum.  Launched in December 2020 to coincide with UNHCR’s 70th anniversary, Aiming Higher strives to widen access to secondary and higher education for refugees, a goal and vision which lies at the heart of both the Global Compact for Refugees and the 2030 Agenda for Sustainable Development.</p> <p>In 1972, Pyarali Nanji, his wife, Gulshan, and their four children were among thousands exiled from Uganda. Stripped of their citizenship and assets, they were declared stateless. The family found sanctuary in Canada, first arriving in Montreal and later settling in Toronto.</p> <p>The Nanji family has remained steadfastly determined and committed to giving back generously to the country that welcomed them, making a point to give equal support to causes both within Canada and internationally. As such, the Aiming Higher campaign serves to fulfill a long-held aspiration on behalf of the foundation to help support the advancement and empowerment of refugees through the pursuit of higher learning.</p> <p>The hope is that this gift will encourage others to similarly support opportunities for young people facing forced displacement. There is a life cycle to the experience of giving back as a former refugee. First, you give back to your community, then to your country and ultimately globally – because that too is family. When possible, people give in stages and their ability expands over time.  Aiming Higher is seeking private sector support to bridge the funding gap of UNHCR’s refugee tertiary scholarship program (DAFI) and help expand opportunities. The program offers qualified refugee and returnee students the possibility of earning an undergraduate degree in their country of asylum, or home country.  “In my life I have learned something, that if God gives you opportunity, try to share it. First of all, you have to make sure that you are taking care of your family, your community, and then the whole country. So, I thought we have to pay back to the country, and the world... and for more than 20 years we have been doing this.” – Mr. Nanji  “It is beautiful what you said about giving back, and even more so, giving opportunity... You can be assured that we will spend it well, this donation. We will spend it to give people opportunities. And maybe in life there is a chain, that</p>	<p>North York General Hospital:</p> <ul style="list-style-type: none"> <li>On December 2, 2010, North York General Hospital officially reopened its renovated Medical Imaging Centre, largely funded by the Nanjis who were among the largest private donors in the hospital’s history. They live near the hospital. In recognition of the Nanjis’ donation, the hospital named a section of the facility — which treats more than 200,000 patients annually — the Gulshan and Pyarali G. Nanji Ultrasound, CT and Radiography Centre.</li> <li>A previous donation by the Nanjis made possible the opening of the Gulshan and Pyarali G. Nanji Orthopedic and Plastics Centre in 2006 and they have also contributed to adolescent mental health treatment at the hospital.</li> <li>Although the Nanjis won’t specify the dollar amount of their donations, their support “totals in the multi-millions.” <ul style="list-style-type: none"> <li>Nanji Ambulatory Care Center</li> <li>Nanji Orthopedic Center</li> <li>Nanji Diagnostic Center</li> <li>Nanji Academic Center</li> </ul> </li> </ul> <p>Sunnybrook Health Sciences Centre:</p> <ul style="list-style-type: none"> <li>The Nanjis first made a transformational gift to Sunnybrook in 2004 when they first learned of a growing need to support adolescents living with mood disorders. Their donation toward brain sciences acknowledged an area of health care that, at the time, wasn’t getting much philanthropic support. Other donors soon came forward, helping turn Sunnybrook’s youth psychiatry division into the largest in Canada. “My passion is to help youth who struggle with serious mood disorders that make everyday life a challenge,” Mr. Nanji says.</li> <li>The Nanji Family Foundation continued to support Sunnybrook, contributing to the expansion and renovation of the emergency department and creation of the Nanji Emergency Response Centre, which serves</li> </ul>

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			<p>people suffer and go through exile and deprivation, and then if they have opportunities, they can give back. And the cycle continues if everybody does what you did.” – Mr. Grandi</p> <p>With this grant of scholarships to over 50 young refugees in commemoration of the 50th Anniversary of South Asian exile from Uganda, the Nanji family is hopeful that others in the community and beyond will feel inspired to support higher education for refugees.</p>	<p>patients with acute needs and provides dedicated space for emergency psychiatric patients.</p> <ul style="list-style-type: none"> <li>The foundation next made a major investment in two critical areas: the Nanji Ambulatory Centre, which occupies 30,000 square feet and is the location of Sunnybrook’s out-patient clinics for dermatology, ophthalmology and vision sciences, plastic surgery and rheumatology, and the four-floor expansion of Sunnybrook’s main wing. This helped to complete the world-class Women &amp; Babies Program facility.</li> <li>When Sunnybrook needed to replace and upgrade its diagnostic MRI scanners in 2015, the Nanji family responded enthusiastically, contributing significant funding to enable the completion of the project that will bring patients the most advanced technology available. Their most recent donation means that more patients will be rapidly diagnosed by some of the most advanced magnetic resonance imaging (MRI) machines available. Sunnybrook now (as of 2017) has four state-of-the-art MRIs, one fully paid for by the Nanji family.</li> </ul> <p>St. Mary’s Hospital:</p> <ul style="list-style-type: none"> <li>St. Mary’s Hospital in Montreal was the first benefactor of the Nanjis’ generosity. “My wife had rheumatoid arthritis,” Pyarali Nanji told the Star, and he was very pleased with the care she got. “I said to her, this hospital, we have to pay back.”</li> </ul> <p>University of Toronto:</p> <ul style="list-style-type: none"> <li>In 2017, they made a donation in support of eye care initiatives that see ophthalmologists travel to countries around the world to restore people’s sight and teach local surgeons to do the operations themselves. The generous donation will establish a five-year term Chair for the Department of Ophthalmology and Vision Sciences, which will be held by the Department Chair, Dr. Sherif El-Defrawy—an eye surgeon, researcher and award-winning teacher. A large portion of the funds will be dedicated to</li> </ul>

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				<p>capacity-building global health missions that El-Defrawy and other faculty members lead in Uganda, Kenya, Ethiopia, Ghana and Haiti, among other low- and middle-income countries.</p> <p>Markham Stouffville Hospital</p> <ul style="list-style-type: none"> <li>In 2020 the Gulshan and Pyarali G. Nanji Family made a transformational, multi-million dollar donation to Markham Stouffville Hospital. In honour and recognition of the gift, Markham Stouffville Hospital named its mental health unit Gulshan and Pyarali G. Nanji Mental Health Services. The Nanji family gift supports the most urgent needs and priorities of the hospital, including mental health services, critical equipment to support emerging needs, and research, innovation and education.</li> </ul> <p>Scarborough Health Network:</p> <ul style="list-style-type: none"> <li>Nanji Stroke Centre</li> </ul> <p>CNIB:</p> <ul style="list-style-type: none"> <li>Nanji Smart Life Centers</li> </ul> <p>Aga Khan Museum:</p> <ul style="list-style-type: none"> <li>In September, 2023, the Gulshan &amp; Pyarali Gulamali Nanji Family Foundation gifted a transformative multi-million-dollar donation to the Aga Khan Museum that will expand the Museum’s reach and impact around the globe, deepening their understanding of Muslim arts and cultures and their connection with the world. The gift will enable the Museum to enhance onsite and digital learning around the Museum’s Permanent Collection and engender significant, unique Performing Arts programs which provide opportunities for communities to connect through collaboration and performance. In recognition of the gift, the Museum's Auditorium will be renamed the Nanji Family Foundation Auditorium.</li> </ul> <p>Other:</p>

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				<ul style="list-style-type: none"> <li>The Nanjis have also made gifts (amounts/dates unspecified) to Aga Khan University and Hospital, and Scarborough Health Centre.</li> <li>In 2020 the foundation donated \$1.6 million, split equally by 16 Canadian hospitals — including Montreal’s MUHC and CHUM — to help combat COVID-19 through research and staff support.</li> <li>In 2022 (See Gift Announcement), to commemorate the 50th anniversary of the family’s welcome to Canada, the foundation donated \$1 million to the United Nations Refugee Agency’s (UNHCR) Aiming Higher campaign, to provide financial support for a four-year period to 50 refugee students pursuing health-related university studies in their countries of asylum. Launched in December 2020 to coincide with UNHCR’s 70th anniversary, Aiming Higher seeks to make secondary and higher education accessible to refugees.</li> </ul>
10	9	<p>Barrett Family / Barrett Family Foundation</p> <p>The Barrett Family Foundation Established: 2013 Business Number: 823257530RR0001</p> <p>Contact Information: 197 Norseman Street, Toronto, ON, M8Z2R5</p> <p>To learn more about the Barrett Family Foundation, contact Alister Mathieson, Executive Director at <a href="mailto:alistermathieson26@gmail.com">alistermathieson26@gmail.com</a></p> <p>Additional Details on the Barrett Family (and their related foundation and company’s views on philanthropy): <a href="https://www.polytainersinc.com/community/">https://www.polytainersinc.com/community/</a></p>	<p>The Barrett Family Foundation is committed to supporting a broad range of causes. Charitable sectors that have benefitted include: education, environment, health, the arts and <b>humanitarian causes</b>.</p> <p>In addition, more than 100 daughters and sons of Polytainers’ employees have been chosen to receive post-secondary scholarships since 1986. The awards acknowledged the recipients’ leadership contributions and academic performance.</p> <p>Humber College was one of the first partners of the Barrett Family Foundation and is now the largest partner. The Barrett Family Foundation’s investment in Humber College supports the design, development and operation of the Barrett Centre for Technology Innovation (Barrett CTI) and provides support to help students acquire the knowledge and skills that equip them for workplace effectiveness.</p> <p>The Barrett CTI inspires innovation, supports skills development and promotes science, technology, engineering, arts and mathematics (STEAM) outreach in collaboration with industry and the community.</p> <p><u>Key Person:</u></p>	<p>Barrett Family Foundation:</p> <p>Interests:</p> <ul style="list-style-type: none"> <li>Education</li> <li><b>Health</b></li> <li>Social Services</li> <li>Children and youth (0 to 18 years)</li> <li>Toronto</li> </ul> <p>Financials Total Assets (2022): \$4,513 Total Gifts (2022): \$0</p> <p>Board Members</p> <ul style="list-style-type: none"> <li>Rebecca Barrett</li> <li>Kimberly Barrett McKenna</li> <li>Francine Rouleu-Barrett</li> </ul> <p>Officers</p>

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		<p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>The Barrett family has a strong connection to <b>entrepreneurship</b> – Bob Barrett cites his father’s entrepreneurship as a driving aspect of his work and community service.</li> <li>They gave a <b>\$30M gift to WorldVision – with a focus on supporting programming in the African countries of Kenya, Tanzania and Rwanda.</b></li> <li><b>Health is a priority</b> of the Barrett Family Foundation.</li> </ul>	 <p>Bob Barrett</p> <p>A graduate of University of Massachusetts (BA in Economics), Bob had the advantage of being born into a family where his father’s business acumen and commitment to excellence set the standard for success. Bob’s personal expectations and those of Polytainers’ Team Members exemplify “excellence.” The workplace vision combines the use of state-of-the-art technology with the aspiration to exceed customer expectations. Integrity is not negotiable.</p> <p>On creating the Barrett Family Foundation:  <i>“I am deeply inspired by my father’s life-long teaching of ingenuity, entrepreneurship, and giving back.”</i>  – Bob Barrett</p> <p><u>News:</u></p> <p><b>The Barrett Family Foundation is Catalyzing Change in GTA Communities</b>  United Way Greater Toronto, November 14, 2022  <a href="https://www.linkedin.com/pulse/barrett-family-foundation-catalyzing-change-gta-communities/">https://www.linkedin.com/pulse/barrett-family-foundation-catalyzing-change-gta-communities/</a></p>	<ul style="list-style-type: none"> <li>Robert Barrett, President</li> </ul> <p><u>Giving:</u></p> <ul style="list-style-type: none"> <li>\$1M+ to the United Way of Greater Toronto (Cumulative, 2022)</li> </ul> <p><u>Notable Gifts:</u></p> <p>\$10M to the YMCA of the GTA in June 2024:  <a href="https://www.ymcagta.org/news/YMCA-of-Greater-Toronto-receives-largest-donation-from-The-Barrett-Family-Foundation">https://www.ymcagta.org/news/YMCA-of-Greater-Toronto-receives-largest-donation-from-The-Barrett-Family-Foundation</a></p> <p>\$30M to Humber College in January 2023:  <a href="https://humber.ca/today/media-releases/humber-college-receives-30-million-gift-barrett-family-foundation">https://humber.ca/today/media-releases/humber-college-receives-30-million-gift-barrett-family-foundation</a></p> <p><b>\$30M to WorldVision in January 2024 to help vulnerable youth in Kenya, Tanzania and Rwanda and seven countries in Latin America:</b>  <a href="https://www.worldvision.ca/barrett-family-\$30m-donation">https://www.worldvision.ca/barrett-family-\$30m-donation</a></p> <p>Also:  <a href="https://www.newswire.ca/news-releases/the-barrett-family-foundation-s-transformational-gift-of-30-million-to-world-vision-canada-marks-largest-private-donation-in-its-67-year-history-817665698.html">https://www.newswire.ca/news-releases/the-barrett-family-foundation-s-transformational-gift-of-30-million-to-world-vision-canada-marks-largest-private-donation-in-its-67-year-history-817665698.html</a></p>
10	9	Trottier Family / The Trottier Foundation	Mission/Philosophy:	The Trottier Foundation:

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		<p>Established: 2000 Business Number: 863613295RR0001</p> <p>Contact Information: 1095 St-Alexandre St., Montréal, QC, H2Z1P8 Phone: 514-395-8823 Language: Bilingual Email: <a href="mailto:info@trottierfoundation.com">info@trottierfoundation.com</a></p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>The Trottier Foundation has an interest in both <b>Healthcare</b> and <b>International</b> issues, and as a donor it has supported the following organizations: <b>UNICEF, Doctors Without Borders, Médecins du Monde, and Oxfam.</b></li> <li>The Trottier family and foundation are based in <b>Montreal.</b></li> <li>Lorne Trottier has significant <b>McGill University connections.</b></li> <li>Research has included the bio and contact details for the Trottier Foundation staff member focused on health. <b>Erin Hetherington also has strong Montreal and McGill connections and has worked in public health and in East Africa in past roles. She would be a great engagement contact.</b></li> <li>Lorne Trottier is routinely mentioned as an early <b>Montreal entrepreneur</b>; the company was founded in 1976.</li> </ul>	<p>The Trottier Family Foundation was established to create meaningful impact that improves the lives of Canadians. In the spirit of that vision, the Foundation specifically supports projects that promote innovative scientific discovery, mitigate climate change and protect the environment, enhance education, improve patient and health care, and provide assistance to select community and <b>international initiatives.</b></p> <p><b>VISION</b> The Trottier Family Foundation’s vision is to make a meaningful and positive impact on the world. We believe we can achieve this by promoting science, education, health and the environment.</p> <p><b>MISSION</b> Our mission is to support organizations that work towards the advancement of scientific inquiry, the promotion of education, fostering better health, protecting the environment and mitigating climate change. The Trottier Family Foundation strives to catalyze and scale transformative innovations, create cross sector collaborations, and take risks that others cannot.</p> <p><b>OUR APPROACH</b> We believe that science, the environment, health and education are crucial pillars in building a better world. While the specifics of what we work on evolved over the years, investments in these four areas remain the cornerstone of everything we do and is central to our theory of change.</p> <p><b>HISTORY</b> The Trottier Family Foundation is a Montreal-based private Canadian charitable foundation established under the Canada Not-for-profit Corporations Act and Income Tax Act (Canada). The Foundation’s purpose is to provide support to registered charities and qualified donees in the areas of education, science, health, the environment, as well as to community and international organizations. The Trottier Family Foundation was established in 2000 by Lorne Trottier and Louise Rousselle Trottier. In the first 10 years of its existence, the grants the Foundation made reflected the long-standing interests and commitments of the Trottier Family. These included McGill University, University of Montreal, local hospitals such as the MUHC, CHUM, the Lakeshore General Hospital, the West Island Palliative Care Residence and other partners in the Montreal region. In those early years, the Foundation supported capital campaigns as well infrastructure projects such as university and hospital buildings and medical equipment. Some of the organizations that received support in the beginning of the Foundation’s history continue to be recipients to this day. In 2016, The Foundation hired staff to lead the operations of the organization and refocused its efforts to support innovation in the areas of Health, Education, Science and the Environment.</p> <p><b>HOW WE WORK</b></p>	<p><b>Interests:</b></p> <ul style="list-style-type: none"> <li>Education</li> <li>STEM education</li> <li>Environment</li> <li>Climate change</li> <li><b>Health care</b></li> <li>Sciences and social sciences</li> <li>Canada</li> <li>Greater Montréal - Laval</li> <li><b>International</b></li> </ul> <p><b>Financials:</b> Total Assets (2022): \$688,443,611 Total Gifts (2022): \$22,006,133</p> <p><b>Board Members</b></p> <ul style="list-style-type: none"> <li>Claire Trottier</li> <li>Sylvie Trottier</li> <li>Howard Trottier</li> </ul> <p><b>Officers</b></p> <ul style="list-style-type: none"> <li>Louise Rousselle Trottier, Secretary Treasurer</li> <li>Lorne Trottier, President</li> </ul> <p><u>Giving:</u></p> <ul style="list-style-type: none"> <li>\$4M+ to McGill University Health Centre Foundation (2021)</li> <li>\$1M+ to such organizations as: Canadian Institute for Advanced Research, Let’s Talk Science, The David Suzuki Foundation, Fondation Du Centre Hospitalier De L’université De Montréal, Lakeshore General Hospital and the Musée Des Beaux-Arts De Montreal / Montreal Museum of Fine Arts.</li> <li>Small gifts (\$10K and under) to <b>CUSO International.</b></li> </ul>

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			<p>The Trottier Family Foundation’s grant making and investment activities are focused on assisting organizations that are working to systematically address the following:</p> <ol style="list-style-type: none"> <li>1. Advancing scientific inquiry and scientific education;</li> <li>2. Promoting the importance of education in society, primarily STEM (Science, Technology, Engineering, Math);</li> <li>3. Mitigating the threats caused by climate change, particularly with a focus on the transition towards a low carbon economy;</li> <li>4. <b>Advancing towards a healthy society;</b></li> <li>5. <u>Incorporating the promotion of science, education, <b>health</b> and the environment in grants made to the Montreal community and <b>internationally.</b></u></li> </ol> <p>Our grantmaking approach is a hybrid between arm's length grantmaking and participatory grantmaking. Projects are identified through two ways:</p> <ol style="list-style-type: none"> <li>1. The Foundation accepts grant applications via our online application process. Submitted requests for funding go through our normal grantmaking process.</li> <li>2. The Foundation seeks out initiatives and activities to fund. We actively seek out innovative projects where we see gaps and where we feel we can have a meaningful impact. This proactive approach entails collaboration with other foundations as we pursue projects which address pressing needs.</li> </ol> <p>COLLABORATION</p> <p>With a focus on collaboration and continuous learning, we work closely with other foundations that share similar visions. The Foundation is a member of collaboration networks such as Philanthropic Foundations Canada, Environment Funders Canada, the Clean Economy Fund, and the Peace Network For Social Harmony.</p> <hr/> <p>Key Persons:</p>	<p><u>Notable Gifts:</u></p> <p>Lorne Trottier and the Trottier Family Foundation have given over \$40M to McGill in recent history. See: <a href="https://www.mcgill.ca/oss/lorne-trottier-consultant">https://www.mcgill.ca/oss/lorne-trottier-consultant</a></p>

# Madiro Prospecting Chart (Summer 2024)

## July 22, 2024


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			 <p>Lorne Trottier CO-Founder, Matrox Founder &amp; President, The Trottier Foundation</p> <p>Excerpts below on Mr. Trottier’s background and approach to <b>international aid</b>; full background here: <a href="https://www.matrox.com/en/about/lorne-trottier">https://www.matrox.com/en/about/lorne-trottier</a></p> <p><b>Background:</b> In 1976, Lorne M. Trottier co-founded Matrox, a privately held group of companies known around the world for its innovative products in the areas of video/graphics for the television and A/V industries and imaging for the machine vision and factory automation industries. Since the company’s founding, Lorne has been the key player in the engineering aspect of the business, originating many of Matrox’s most prominent products. To this day, Lorne works closely with key managers and engineers and maintains an active role in product development and innovation activities at Matrox.</p> <p>In addition to his work in technology development at Matrox, Lorne has numerous other interests spanning various fields such as climate change, energy, astronomy and aerospace science. A benefactor, philanthropist, engineer, businessman, and visionary leader, Lorne has devoted his life’s work to advancing science and technology and building community.</p> <p>In 2019, Lorne bought out his co-founding partner in Matrox and is now ready to lead Matrox through its next chapter.</p> <p><b>Local community support and international humanitarian aid</b> <b>The Trottier Foundation supports many international humanitarian aid organizations such as UNICEF, Doctors Without Borders, Médecins du Monde, and Oxfam.</b></p>	

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			<p>The Trottier Foundation also supports organizations in local communities with a focus on helping the underprivileged in the Greater Montreal Area, and the Province of Quebec. Since the outbreak of the COVID pandemic, the Foundation created an additional \$15M fund for 2020 and 2021. The Foundation has worked with a consortium of philanthropic actors to fund initiatives that aim to stem the spread of the pandemic, including a bottom up territorial approach wherein highly affected neighborhoods develop and implement emergency action plans in collaboration with key local actors. It has also provided funding for scientific research and collaboration between Canadian researchers.</p> <hr/>  <p>Erin Hetherington Health Director</p> <p>Erin is passionate about working with communities to create sustainable solutions to improve health equity. She has led local and international research studying the impacts of social conditions on health and evaluating models of care for underserved populations. <b>A Montrealer, Erin has also lived and worked in Latin America and East Africa where she developed international educational and health collaborations.</b> In Canada, Erin’s work has focused on improving maternal and child health for underserved populations.</p> <p>Prior to joining the Foundation, Erin was an epidemiologist for the Public Health Agency of Canada, and a research fellow at McGill and the University of Calgary. She holds a PhD in epidemiology and has studied at McGill, Harvard, and the University of Calgary.</p> <p>Contact: <a href="mailto:erinhetherington@trottierfoundation.com">erinhetherington@trottierfoundation.com</a></p>	
10	9	Doug Fregin Co-Founder & Managing Partner, Quantum Valley Investments Fund		<p><u>Rich Lists:</u></p> <p>Forbes ranks Fregin as a billionaire, with the following citation:</p> <p>About Douglas Fregin:</p>
		Quantum Valley Investments 560 Westmount Road North,		

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RT	AF	Prospect Name	Background	Financials & Giving
		<p>Waterloo, ON N2L 0A9</p> <p>Email available here: <a href="https://quantumvalleyinvestments.com/contact-us/">https://quantumvalleyinvestments.com/contact-us/</a></p> <p>Research Notes:</p> <ul style="list-style-type: none"> <li>Waterloo-based <b>entrepreneur</b> that may be able to open the door to other well known RIM-era business leaders (such as Mike Lazaridis).</li> <li>His philanthropic pursuits include <b>assisting various African-centered charitable projects.</b></li> </ul>	 <p>Doug Fregin Co-Founder &amp; Managing Partner, Quantum Valley Investments Fund</p> <p>Mr. Fregin co-founded the Quantum Valley Investments Fund in March 2013 with his close friend Mike Lazaridis. Messrs. Fregin and Lazaridis also co-founded Research In Motion Limited (RIM) in 1984, which created the BlackBerry wireless device that revolutionized the communications industry. Mr. Fregin served as the Vice President of Operations and as a Director of RIM until he retired in 2007. He was instrumental in evaluating various materials, fabrication technologies and design of the first circuit boards that were used in early versions of the company’s wireless technology that are now standard in the BlackBerry. Mr. Fregin studied electrical engineering at the University of Windsor. He was awarded the Queen’s II Diamond Jubilee Medal and is a Member of the Order of Canada. He also shares a Technical Emmy Award (1994) for Development of a Keycode Reader with Kodak and the National Film Board of Canada.</p> <p><b>Currently, Mr. Fregin devotes a significant amount of his time and resources assisting various African Charitable Projects including the establishment and operation of a Vocational School in rural Uganda.</b> He has also made contributions to a number of other philanthropic endeavours including donations to the Nanotechnology Initiative and the Quantum-Nano Centre at the University of Waterloo, as well as the Perimeter Institute for Theoretical Physics.</p>	<ul style="list-style-type: none"> <li>Cofounded Research In Motion with childhood friend and fellow billionaire Mike Lazaridis in 1984. Back in ranks thanks to loonie and 10% rise in value of RIM shares. The former vice president of operations retired from company 2007. Fregin was instrumental in designing the first circuit boards that were used in early versions of the company's wireless technology. He was also key in selecting the materials that are now standard in the BlackBerry.</li> </ul> <p><u>Giving:</u></p> <ul style="list-style-type: none"> <li>\$25M+ to the Perimeter Institute (Capital/Endowment, 2017-2022)</li> </ul>
10	7	<p><b><i>There are a couple of leads identified in this prospect row:</i></b></p> <ul style="list-style-type: none"> <li><b><i>The Rossy Foundation &amp; Rossy Family</i></b></li> </ul>	About the foundation:	<p>The Rossy Foundation:</p> <p>Interests:</p>

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RT	AF	Prospect Name	Background	Financials & Giving
		<ul style="list-style-type: none"> <li><b><i>Gregory David and the Gregory J. David Foundation (Note – Gregory J. David could be a prospect on his own, but he is also on the Rossy Family Foundation board, and is a director with Dollarama; the Rossy family’s business)</i></b></li> <li><b><i>The Leonard T. Assaly Family Foundation (where Gregory David is a board member)</i></b></li> </ul> <hr/> <p>The Rossy Foundation</p> <p>Established: 2004 Business Number: 863906236RR0001</p> <p>Contact Information: 5690 Royalmount, Mont-Royal, QC, H4P1K4</p> <hr/> <p>Gregory J. David President &amp; CEO GRI Capital Inc. 1003 -1 St Clair Avenue East Toronto ON M4T 2V7 Canada 416-816-6877 <a href="mailto:greg.david@gricapital.com">greg.david@gricapital.com</a></p> <p>Also:</p> <p>Gregory J. David Foundation:</p> <p>Established: 2011 Business Number: 801010802RR0001</p> <p>Contact Information: 5690 Royalmount, Mont-royal, QC, H4P1K4</p>	<p>The Rossy Family Foundation is a Montréal-based philanthropic foundation that funds initiatives in health care, mental health, education, the arts and Canadian civil society. Established by Larry Rossy, the Chairman Emeritus of Dollarama Inc., the Foundation has made major donations to a variety of health-care and cultural institutions in Québec and nationally. Notably, the Foundation established the Rossy Cancer Network in Montreal in 2012.</p> <p>The Foundation is also a significant contributor to mental health initiatives in post-secondary settings, including a collaborative investment with Bell Let’s Talk to create a national standard for post-secondary student mental health to support student success on college and university campuses across Canada.</p> <p>About Dollarama Dollarama is a recognized Canadian value retailer offering a broad assortment of consumable products, general merchandise and seasonal items both in-store and online. Our 1,569 locations across Canada provide customers with compelling value in convenient locations, including metropolitan areas, mid-sized cities and small towns. Select products are also available, by the full case only, through our online store at <a href="http://www.dollarama.com">www.dollarama.com</a>. Our quality merchandise is sold at select fixed price points up to \$5.00.</p> <p>Dollarama also owns a 60.1% interest in Dollarcity, a growing Latin American value retailer. Dollarcity offers a broad assortment of consumable products, general merchandise and seasonal items at select, fixed price points up to US\$4.00 (or the equivalent in local currency) in 547 conveniently located stores in El Salvador, Guatemala, Colombia and Peru.</p> <p><u>Key Persons:</u></p>  <p>Neil Rossy President and Chief Executive Officer, Dollarama</p>	<ul style="list-style-type: none"> <li>Arts and culture</li> <li>Education</li> <li><b>Health</b></li> <li><b>Health care</b></li> <li>Social Services</li> <li>Greater Montréal - Laval</li> <li>Middle East</li> <li>Direct Charitable Programming</li> </ul> <p>Financials: Total Assets (2022): \$1,006,480,383 Total Gifts (2022): \$28,755,148</p> <p>Board Members</p> <ul style="list-style-type: none"> <li>Gregory David</li> <li>Stephanie Rossy</li> <li>Neil Rossy</li> </ul> <p><u>Giving:</u></p> <ul style="list-style-type: none"> <li>\$10M to Toronto General and Western Hospital Foundation (Cumulative, 2020)</li> </ul> <p><u>Notable Gifts:</u></p> <p>Donation to Queens University to establish the student mental-health research centre (August 2023) <a href="https://www.queensu.ca/gazette/media/news-release-donation-establishes-student-mental-health-research-centre-queen-s">https://www.queensu.ca/gazette/media/news-release-donation-establishes-student-mental-health-research-centre-queen-s</a></p> <p>\$10M to the Dana-Farber Cancer Institute (August 2021) <a href="https://defycancer.dana-farber.org/donor-recognition/rossy-foundation/">https://defycancer.dana-farber.org/donor-recognition/rossy-foundation/</a></p> <hr/> <p>Gregory J. David Foundation</p>

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RT	AF	Prospect Name	Background	Financials & Giving
		<p>Phone: 514-731-4647 Fax: 514-731-8366</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>The Rossys and Gregory David have strong connections to <b>Montreal</b>.</li> <li>Gregory David – and his family – <b>have strong connections to McGill University</b>.</li> <li>Both the Rossys and Gregory David have a strong connection to <b>entrepreneurship – primarily in the retail sector</b>.</li> <li><b>Health and healthcare are priorities</b> of the Rossy, David and Assaly foundations.</li> <li>The Pathy and Rossy families are often listed as attending the same events; they may have close connections to one another.</li> </ul>	<p>Board member, Rossy Family Foundation</p> <p>Neil Rossy is a member of the Board of Directors since 2004 and serves as President and Chief Executive Officer of the Corporation since May 1, 2016. Prior to being appointed to this office by the Board of Directors, he had served as Chief Merchandising Officer of Dollarama since 2010. With the company since its inception in 1992, he has been involved in all aspects of Dollarama’s business, supply chain and day-to-day operations. Over the last three decades, Neil Rossy has played an increasingly important role in strategic decisions related to warehousing and distribution, direct sourcing, brand identity, product development and merchandising innovations that define Dollarama and underpin its success. He is a graduate of Queen’s University.</p>  <p>Gregory J. David President &amp; CEO, GRI Capital Director, Dollarama Board member, Rossy Family Foundation</p> <p>Gregory J. David is a distinguished professional currently serving as the President and CEO of GRI Capital Inc., a private investment management firm he has led since its inception in 2005. Before this role, Gregory held positions including Senior Vice President at Dollarama Group LP and was the Principal at Claridge, Inc.</p>	<p>Interests:</p> <ul style="list-style-type: none"> <li>Performing arts</li> <li><b>Health care</b></li> <li>Social Services</li> <li>Ontario</li> <li>Toronto</li> <li>Montréal</li> </ul> <p>Financials: Total Assets (2022): \$20,034,985 Total Gifts (2022): \$660,915</p> <p>Board Members</p> <ul style="list-style-type: none"> <li>Robert David</li> </ul> <p>Officers</p> <ul style="list-style-type: none"> <li>Neil Rossy, Secretary</li> <li>Gregory David, President</li> </ul> <p><u>Giving:</u></p> <p>Gregory J. David and/or the Gregory J. David Foundation:</p> <ul style="list-style-type: none"> <li>\$100K-\$499K to The Havergal College Foundation (Cumulative, 2018)</li> <li>\$100K+ to McGill University (2018)</li> <li>\$50K-\$99K to The Lower Canada College Foundation - La Fondation Lower Canada College (2011 &amp; 2014)</li> </ul> <hr/> <p>The Leonard T. Assaly Family Foundation Established: 2004 Business Number 863817177RR0001 Contact Information 5690 Royalmount, Mont-royal, QC, H4P1K4</p> <p>Interests:</p> <ul style="list-style-type: none"> <li>Education</li> </ul>

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			<p>Apart from his professional achievements, Gregory is deeply embedded in philanthropic efforts, notably through the Gregory J. David Foundation (The David Family Foundation) which has significantly contributed to educational and health initiatives. He has also played a role in various boards including <b>the McGill University Board of Governors</b> and establishing and <b>servicing on the board of the Rossy Family Foundation</b>. His philanthropic interests particularly align with enhancing student well-being and academic facilities, as evidenced by his leadership in major donations like establishing the Rossy Cancer Network and contributions to McGill’s Faculty of Law. He is also a board member with the Leonard T. Assaly Family Foundation.</p> <p><b>Gregory’s family connections to McGill University run deep, with several family members being alumni and active contributors, highlighting a strong legacy of engagement and support for educational institutions.</b> He also has several significant personal connections in the business community through his network from Lower Canada College, and from his career and directorship positions.</p>	<ul style="list-style-type: none"> <li>• Cancers and tumours</li> <li>• <b>Health care</b></li> <li>• Social Services</li> <li>• Low-income or people experiencing poverty</li> <li>• Ontario</li> <li>• Québec</li> </ul> <p>Financials Total Assets (2022): \$25,357,843 Total Gifts (2022)</p> <p>Board Members</p> <ul style="list-style-type: none"> <li>• Joanne Assaly</li> <li>• <b>Gregory David</b></li> <li>• Leonard Assaly</li> </ul> <p>Past Board Members</p> <ul style="list-style-type: none"> <li>• Olga Munari-Assaly</li> </ul> <p><u>Giving:</u></p> <p>The Leonard T. Assaly Family Foundation:</p> <ul style="list-style-type: none"> <li>• \$50K-\$99K to the Arthritis Society/La Societe D'arthrite Quebec Division (2023)</li> <li>• \$30K+ to the West Island Cancer Wellness Centre / Centre De Bien-Être De L'ouest-De-L'île Pour Personnes Atteintes De Cancer (2020)</li> </ul>
9	10	<p>Chandaria Family</p> <p>Conros Corporation: 41 Lesmill Rd, North York, ON M3B 2T3 +1 877-779-4125 or Alternate Call Number: 647 749 6050</p> <p><u>Research Notes:</u></p>	<p>The Chandaria Family:</p> <p>Background on the Chandaria Family and their connections to both <b>Africa</b> and <b>entrepreneurship</b>. <a href="https://www.privatebank.citibank.com/we-serve/chandaria-family">https://www.privatebank.citibank.com/we-serve/chandaria-family</a></p>	<p><u>Giving:</u></p> <p>The Chandaria Family:</p> <ul style="list-style-type: none"> <li>• \$1M-\$4.9M to the Toronto General and Western Hospital Foundation (Cumulative, 2020)</li> <li>• Other giving from the Chandaria family has been in the \$50K-\$100K range to such hospitals as: The Princess Margaret Cancer Foundation, Holland Bloorview Kids Rehabilitation Hospital Foundation, St. Michael's Hospital</li> </ul>

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7 – Some connections evident to Madiro’s cause, mission and community

RT	AF	Prospect Name	Background	Financials & Giving
		<ul style="list-style-type: none"> <li><b><u>The Chandaria’s have deep connections to Africa:</u></b> Navin Chandaria (Shernee, Sunir and Sheena’s father) emigrated to Canada from Africa. The extended family has considerable business interests in Africa. Sunir Chandaria has acted as the Hon. Consul of Kenya in Toronto.</li> <li><b><u>Sheena and Shernee Chandaria are McGill graduates</u></b> and have been volunteers for the school since graduating.</li> <li><b><u>The family has a strong connection to entrepreneurship,</u></b> and the Chandaria Family Office – managed by Sunir Chandaria – has interests in a wide variety of sectors for investing.</li> </ul>	 <p>Shernee Chandaria President at Conros Corporation and LePage's 2000</p> <p>Shernee Chandaria is the President of Conros Corporation, an innovative family owned manufacturing and distribution company. She has a resilient passion for ‘getting things done’ and driving results through collaboration, partnerships, and relationships. Shernee is also a Governor on the North York General Hospital Foundation, Board Member with the Toronto French School Foundation Board, as well as a mentor for the DFZ – Design Fabrication Zone for Ryerson/TMU. Shernee holds a BA from McGill University.</p>	<p>Foundation and The Princess Margaret Cancer Foundation</p> <p>Conros Corp:</p> <ul style="list-style-type: none"> <li>\$25K-\$99K to Toronto General and Western Hospital Foundation (Cumulative, 2013)</li> </ul> <p><u>Additional details regarding the Chandaria family wealth:</u></p> <ul style="list-style-type: none"> <li>The Chandaria family traces its roots to Kenya, where Navin Chandaria and his father established successful manufacturing enterprises. (Tibro is the name of the family business in Kenya, Orbit Chemicals, spelled backwards.)</li> <li>The Chandaria family is large and multigenerational and ultimately traces its roots back to the Indian state of Gujarat. Note that another Gujarati Jain family that has been successful in Canada is that of Soham “Sam” and Shreyas Ajmera</li> <li>The Chandaria’s moved to Canada in the late 1970s and launched a number of ventures, including Northland Firelogs and Ross Adhesives - maker of that purple glue stick - which they subsequently sold off to larger manufacturers.</li> <li>The Chandaria family remains prominent in Kenyan business. The current head of the family (in Kenya) is Manilal Premchand Chandaria OBE EBS chairman and CEO of the Comcraft Group of Companies, a billion-dollar enterprise that has a presence in over 40 countries. Mr. Chandaria is on the boards of several prominent East African companies and has won several awards in East Africa and internationally in recognition of his entrepreneurial endeavours and is also a noted philanthropist. In 2003, he was awarded the OBE by Queen Elizabeth II. In December of the same year, he was awarded the Elder of the Burning Spear by President Mwai Kibaki, one of the highest civilian honours in Kenya.</li> </ul>

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			 <p>Sunir Chandaria, ICD.D President &amp; CEO, Chandaria Family Holdings, Inc.</p> <p>Sunir Chandaria serves as President of Chandaria Family Holdings, Inc., the Family Office of his branch of the Chandaria Family. He has been charged with managing a portfolio of public and private investments, including early capital behind Mill Street Brewery, Element Financial, and ROAR Organic. Sunir retains oversight of the family’s direct interests in technology, agriculture, medical supplies, mining, and real estate, as well as investments in venture, growth, and hedge funds with diverse expertise. Prior to his role in the Family Office, Sunir served as President of LePage’s, a family portfolio company that is a leader in office supplies distribution to major retailers in North America and around the globe.</p> <p>Sunir graduated with a BA (Hons) in Economics and Management from Oxford University, where he subsequently sat on and concluded his term on the inaugural Foundation Board of St Peter’s College and has served as Chair of the East African Advisory Council of the Rhodes Trust. He is a Member of Young Presidents’ Organization (YPO) where he served for two years as Chair of YPO, Canada and was the Founding Chair of the Young Fellowship of the Duke Edinburgh’s International Award for Young People. Sunir is a Member of the Institute of Corporate Directors (ICD) and has enjoyed experience on the Boards of private and public sector organizations, including the Ontario Lottery &amp; Gaming (OLG) Corporation. He additionally enjoys the privilege of serving as the Hon. Consul of Kenya in Toronto, Canada.</p> <p>Chandaria Family Holdings, Inc. (CFHI) is the family office of our third generation business family. We enjoy a history of success in consumer packaged goods manufacturing and distribution and have since broadened our platform to include a sleeve of real estate and a number of private investments across a wide geography and diverse industries. It</p>	<p>He has been hailed as "one of Kenya's leading industrialists".</p> <ul style="list-style-type: none"> <li>Manilal Premchand Chandaria is a committed Jain, and in fulfilment of this principle he and his family set up the Chandaria Foundation to further this belief. As Comcraft operates in more than 11 African countries, the Chandaria family has set up charitable trusts in each country to assist in their philanthropic exploits. As the chairman of the Chandaria Foundation he is at the forefront of the charitable work of the family. He is the benefactor of numerous schools and clinics in Kenya and is or has been with involved with more than 25 organisations. Chandaria cites John D. Rockefeller and Henry Ford as the inspiration for his philanthropic streak due to their establishing the Rockefeller Foundation and Ford Foundation respectively.</li> </ul> <p><u>The Chandaria Foundation:</u></p> <ul style="list-style-type: none"> <li>The Chandaria Foundation (Canada) is not a CRA registered charity</li> <li>Research suspects that the foundation is linked to the Chandaria Foundation of Kenya which is controlled by Manilal Premchand Chandaria head of the Kenyan branch of the family.</li> </ul>

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6 – Prospect of Interest

RT	AF	Prospect Name	Background	Financials & Giving
			<p>is most important to us that we clearly understand how we can be a value-add supporter of any entity's journey so that we de-risk and compress the path to a successful outcome.</p> <hr/>  <p>Sheena Chandaria VP, Sales &amp; Corporate Affairs at Conros Corporation</p> <p>Sheena Chandaria graduated from McGill University with a Bachelor of Arts in International Development Studies, after which she started working for her family’s business. Conros Corporation is a leading manufacturer and distributor of a large portfolio of home and office supplies. She has assumed the role of VP, Corporate Affairs, with a focus on the company’s corporate social responsibilities, PR, communications and business development functions. Her interests extend to initiatives around women through the McGill Women, Leadership &amp; Philanthropy Board, and in 2018 she is co-chairing one of Toronto’s leading hospital’s largest fundraisers with her sister.</p> <p><u>About the company:</u></p> <p>Conros Corporation is a private, family held company. Compensation figures are not available.</p> <p>Conros Corporation has been an innovator and industry pioneer since the company was founded by Navin Chandaria in the late 1970s. Initially making its name in the Firelog business, Conros developed Clean-Burn™, a patented technology that allowed its logs to burn cleaner and longer than wood. The company also took a then-unheard-of approach towards its private label assortment by abandoning the established norm of manufacturing cheaper and lower-quality</p>	

# Madiro Prospecting Chart (Summer 2024)

## July 22, 2024


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			<p>products at private label retail in favour of presenting partnering retailers with a higher-end assortment and patented technologies through co-branding agreements - an approach that has since become the industry standard.</p> <p>From an initial 2% market share, Conros expanded its Pine Mountain, Northland and private label Firelog assortment to production at 7 fully-owned and operated manufacturing plants in North America – including the largest North American Firelog plant located in Kitchener-Waterloo, Canada – representative of the lion’s share of the U.S. and Canadian markets. Conros’ rapid success and growth proved that price competitiveness and continued innovation is the key to securing retail distribution. In subsequent years, the company developed exciting new products such as the Javalog™, an innovative and environmentally friendly log made from coffee beans, StarterLogg™, SuperLogg™, and PatioLogg™. Despite its overwhelming share of the entire North American market, Conros divested its Firelog division to Jarden Corporation in 2006.</p> <p>In the mid-1980s, Conros acquired Ross Adhesives, a fledgling liquid glue company that had suffered in a stagnant category dominated by major manufacturers like Elmer's. Again, Conros saw an opportunity - Ross manufactured the "glue stick", an item that had become wildly popular in Europe but had not taken hold in North America due to its repeated dismissal by the major manufacturers who favoured traditional liquid glue and its established user-base. Seeing potential in the glue stick, Conros attempted to seed the market by selling standard bottles of liquid glue with a glue stick packaged on the side. The Ross "Kangaroo Pack" was an instant consumer success and helped secure Ross Adhesives as an industry leader and innovator, while also establishing the glue-stick as a staple of households all across North America. Later innovations such as the Purple Disappearing glue stick generated additional retail success, while new products like glitter, paints, and arts and crafts supplies added depth to the company's entire portfolio. In 2000, Ross Adhesives was divested to Elmer's Products, Inc.</p> <p>Also in 2000, Conros aligned its capabilities with LePage's, Inc., a 130-year-old manufacturer and distributor of stationery tapes and mailing supplies. Under Conros' direction and guidance, LePage's was renamed LePage's 2000 and has been re-energized as a successful and innovative distributor of exciting consumer products. Beyond the basic stationery tape assortment, the total LePage's 2000 portfolio has expanded to a much broader range of products including packaging tapes, a complete assortment of mailing and shipping supplies (bubble mailers, bubble cushion, and corrugated boxes), hardware tapes (masking and duct) and sticky notes. Today, LePage's 2000 brings a total assortment of office supplies as a single vendor capable of fully servicing its partnering retailers.</p> <p>In 2005, Conros acquired Gould Inc., a mailing supplies company and realigned and diversified the original Gould assortment into what is now the Seal-It Brand. The Seal-It™ lineup now consists of packaging and hardware tapes, mailers, mailing boxes, the Bandit™ tape gun, Palmguard™ dispenser, mailing tapes, stationery tapes in Press 'N Cut™ dispensers, and more.</p> <p><u>News:</u></p> <p><b>Hidden angels: Magnet for aspiring startups; As venture capital remains scarce, angel investors are stepping in to fill the gap</b>  <i>The National Post, December 12, 2010</i></p>	

# Maduro Prospecting Chart (Summer 2024)

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RT	AF	Prospect Name	Background	Financials & Giving
			<a href="https://nationalpost.com/news/hidden-angels-magnet-for-aspiring-startups">https://nationalpost.com/news/hidden-angels-magnet-for-aspiring-startups</a>	
9	9	<p>Jeff Willner CEO &amp; Founder, Navigatr Group</p> <p>Navigatr Head Office: 2 Queen Street East, 20th Floor Toronto, Ontario M5C 3G7 Canada (416) 317-0495 contact@navigatr.com</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>Mr. Willner is a serial <b>entrepreneur</b> that has worked in a wide variety of sectors.</li> <li><b><u>He grew up in Africa – in the Democratic Republic of the Congo. His travel company has a number of offices in Africa.</u></b></li> <li>Note: he was appointed to Board Chair of the ROM in 2019, so he may be leaving that position in the near future; making him available for other philanthropic pursuits.</li> </ul>	 <p>Jeff Willner CEO &amp; Founder, Navigatr Group</p> <p>Jeff developed a love for travel while growing up in Africa and driving his Land Rover Defender around the world. <b>A serial entrepreneur, he helped start an aerospace hydraulics company in the early 90’s, then built and sold one of the top computer training companies in North America during the dot com era.</b> After a break for a Wharton MBA and an invaluable half-decade with McKinsey &amp; Company, he launched Kensington Tours in 2006. Navigatr Group evolved as a central services holding company for Jeff’s billion-dollar portfolio of thriving travel brands.</p> <p>Willner is also Board Chair of the ROM Board of Governors. ROM bio is here: <a href="https://www.rom.on.ca/sites/default/files/imce/jeff-willner.pdf">https://www.rom.on.ca/sites/default/files/imce/jeff-willner.pdf</a></p> <p>This interview for ROM indicates his love for Africa <a href="https://www.rom.on.ca/en/support-us/about-the-rom-governors/leadership/jeff-willner">https://www.rom.on.ca/en/support-us/about-the-rom-governors/leadership/jeff-willner</a></p> <p>Additional information on Jeff Willner and his companies: <a href="https://www.travelweekly.com/Travel-News/Travel-Agent-Issues/Jeff-Willner-interview-Ensemble-acquisition">https://www.travelweekly.com/Travel-News/Travel-Agent-Issues/Jeff-Willner-interview-Ensemble-acquisition</a></p> <p><u>News:</u></p>	<p><u>Giving:</u></p> <p>Jeff Willner and Family:</p> <ul style="list-style-type: none"> <li>\$5M+ to the Royal Ontario Museum (Cumulative, 2021)</li> <li>\$250K-\$500K to The Princess Margaret Cancer Foundation (Cumulative, 2021)</li> </ul> <p><u>Gift Announcement:</u></p> <p><b>Travel Edge founder Jeff Willner and his wife donate \$5 million to fund ROM gallery</b> <i>TravelWeek.com</i>, November 15, 2018</p> <p>TORONTO — Travel Edge Group Owner and CEO Jeff Willner and his wife Stacey Madge have donated \$5 million to the Royal Ontario Museum to fund a new 10,000-square-foot permanent gallery that explores the beginnings of life on Earth.</p> <p>Travel Edge is now a \$600 million luxury travel agency with 13 offices in Canada, the U.S. and Bermuda. The Travel Edge Group also includes the \$170 million luxury tour company Kensington Tours, specializing in international private guided travel.</p> <p>Kensington Tours will be developing a special series of trips in conjunction with Parks Canada, to showcase the world-class Canadian fossil sites that contributed significantly to the new gallery.</p> <p>Willner joined the ROM Board of Governors in October 2017. The \$5 million donation will help establish the Willner Madge Gallery, Dawn of Life. The gallery will trace the story of life from its earliest beginnings, about four billion years ago, to the emergence of the first dinosaurs and mammals, and will complement the James and Louise Temerty Galleries of the</p>

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			<p><i>This article was included as it explains the acquisitions and mergers Willner has orchestrated with his companies in the past few years.</i></p> <p><b>Behind Ensemble's acquisition: A CEO who pushes agent value</b> <i>Travel Weekly, June 6, 2022</i></p> <p>In the 1990s, when online travel agencies began to rise alongside the democratization of the Internet, many travel industry observers believed that traditional travel agencies would disappear. Jeff Willner, CEO of private investment company Navigatr Group, which last week closed its acquisition of Ensemble Travel Group, was among them. Now, he's a convert who thinks the consortium's members can double their margins. Willner has come around since working as a consultant at McKinsey &amp; Co., where he advised airlines to invest in direct distribution channels to bypass the trade, and in 2006 founding a safari company that would eventually become Kensington Tours (now in the Navigatr portfolio) that didn't work with travel advisors for its first two years. Willner had what he described as an "epiphany" about the importance of working with an agent to have a better vacation experience. "Because a great travel advisor is a professional," he said. "They know what they're doing. They know what they're selling. They've traveled themselves. They've done training. They're like any great professional, any great lawyer, any great doctor. And what they advise on is the thing that people want the most: Leisure time and experience is the No. 1 thing on the list for people to have." Today, Willner says he believes that advisors are "central" to leisure travel. Toronto-based Navigatr's investments include the aforementioned Kensington Tours, host agency Travel Edge (No. 20 on Travel Weekly's 2021 Power List), travel technology company TripArc and Ensemble. And he also believes the technology developed by TripArc, combined with a professional travel advisor, can help Navigatr's member agencies achieve better margins by at least 10 percentage points. Navigatr made its biggest splash to date with its recent acquisition of Ensemble. But its interest in a consortium to complement its other investments has been ongoing. The company even considered an Ensemble acquisition several years ago.</p> <p>A focus on doubling margins Willner estimates that most agencies currently operate with 10% margins. He said he believes Ensemble members can double that. "There's 330 member agencies, there's \$3.5 billion worth of business going through the consortium, and we're really excited about taking our great technology [to them], but mostly taking our 20% margin thinking and helping those member agency owners to move from 10% to 20%," he said. Coming off the Covid crisis, he described higher margins as "oxygen" for agencies. "A 10% margin, it's like sucking oxygen through a straw, submerged in water," he said. "Twenty percent, at least your head's above water and you're getting big, deep breaths and you can be healthy."</p>	<p>Age of Dinosaurs and the Reed Gallery of the Age of Mammals on the second floor of the ROM.</p> <p>"I'm very pleased to join other leadership donors and the ROM in telling the story of life on Earth through this exciting new gallery –the first of its kind in North America," says Willner. "This is a story for all people, told from a uniquely Canadian perspective, which will help us understand not only our past, but also the world we'll live in tomorrow."</p> <p>Adds ROM Director &amp; CEO, Josh Basseches: "We are very grateful to ROM Governor Jeff Willner and his wife, Stacey Madge, for their transformational gift. Every part of the Earth's story – our shared history – is written in the rocks of Canada. The Willner Madge Gallery, Dawn of Life will inspire people to marvel at how life evolved on our planet, and to do so through a lens that is distinctly Canadian in physical origin." The Willner Madge Gallery will interpret and showcase hundreds of specimens drawn mainly from the ROM's early life fossil collection, many of which have never been on public display before. The story of life's origins will be illustrated with a range of scientifically important specimens originating from Ontario and across Canada, most significantly from the renowned Burgess Shale in Yoho and Kootenay National Parks (British Columbia).</p> <p>The Gallery will also feature specimens from other Canadian UNESCO World Heritage Sites including Joggins Fossil Cliffs (Nova Scotia), Mistaken Point (Newfoundland and Labrador) and Miguasha National Park (Quebec).</p> <p>Visitors to the ROM can currently check a preview display of the Willner Madge Gallery, Dawn of Life on the museum's second floor. Construction of the permanent gallery is slated to begin in 2019 with an anticipated public opening in 2021.</p> <p><u>Navigatr's Philanthropic Approach:</u></p> <p>From the beginning, Navigatr Group has been committed to giving back. Investing in the planet we all share is an essential part of protecting our vision of the future of travel.</p>

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			<p>To do that, Willner proposes a mix of packaging vacation components and a service fee into a single price point and expounding the value of working with an agent.</p> <p>"We make it explicit in our branding message to our customers that what they're getting are three key things: expert support, amenities in their trip and 24/7 support," he said.</p> <p>Willner also wants to encourage advisors to put multiple services together. For instance, he said, adding a 10% service fee onto a single air ticket would be "challenging." But bundling air with a hotel and ground transfer makes it easier to charge more.</p> <p>TripArc's agent platform, ADX, enables bundling and adding a fee, resulting in a single price point for a consumer. Willner said even higher margins are possible: Navigatr had considered purchasing a company that regularly saw 50% margins on specialty products such as tickets to the Olympics.</p> <p>But 20%, he said, is an easier goal to "step up to as long as you, first of all, educate your customer around the value-added services that they're getting and deliver those services. And then make sure that you create single price bundles of items that you're selling."</p> <p>Asked whether Ensemble members seem willing to subscribe to that philosophy, Willner said the idea was to add value, not force change.</p> <p>"We've learned the power of the word 'and' over the course of the last decade and a half," he said.</p> <p>Navigatr's goal is to add capital, people and resources to bolster the consortium.</p> <p>"It's completely up to the members what direction that they want to go, and there's a lot of folks there that have got wonderful businesses that are doing really, really well," Willner said. "They joined a consortium to get consortium-like stuff, so we'll make sure that we're building that consortium accordingly."</p> <p><b>From dot-coms to agencies</b></p> <p>Willner's professional career began outside of the travel industry. It started with an early 1990s launch of an aerospace hydraulics company. Also, in the 1990s during the dot-com boom, he was co-owner of Object Arts, one of North America's top computer-training companies.</p> <p>After he completed an MBA at the Wharton School of the University of Pennsylvania, he took a two-year break to drive around the world, then joined McKinsey &amp; Co. as a consultant.</p> <p>The larger investment company, Navigatr, was founded in 2005, originally called KT Holdings (the Navigatr rebrand came in 2018).</p> <p>Wanting to spend more time with his family, Willner in 2006 launched Kensington Tours, initially a safari company with offices in Kenya and Tanzania (Willner had grown up in Africa). But Kensington would soon expand.</p> <p>"We pivoted to becoming a tour operator, just based on our ability to build tech that we could connect with DMCs around the word," he said.</p> <p>Also starting in 2006, Willner began a series of agency acquisitions under the company Worldview Travel, which he had purchased. Over the years, he made about 13 agency acquisitions, most affiliated with Virtuoso. Worldview rebranded to Travel Edge, the host agency that now sits at No. 20 on Travel Weekly's Power List.</p> <p>Five years ago, Navigatr spun out TripArc, which offers technology platforms for agents, tour operators and destination management companies.</p>	<p>A significant portion of our profits are funneled into community philanthropy, and over the years we have donated a total of over \$10 million to several vital causes.</p> <p>Today our giving is focused around a few core needs:</p> <ul style="list-style-type: none"> <li>• Building educational and life opportunities for young people, both at home and in the global communities where we work.</li> <li>• Supporting efforts to conserve and protect our vast planet through research and sustainable exploration of its ocean ecosystems.</li> </ul> <p>Helping to protect the planet we all share is an essential part of our vision of the future of travel.</p>

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6 – Prospect of Interest


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RT	AF	Prospect Name	Background	Financials & Giving
			During the pandemic, Navigatr launched a group of 50-plus in-house "travel designers" in late 2021, launched as Travel Edge; at the same time, the host agency was rebranded to Travel Edge Network.	
9	8	<p>Bill Morneau Former Minister of Finance of Canada Distinguished Fellow, Munk School of Global Affairs &amp; Public Policy, The University of Toronto</p> <p>Nancy McCain Chancellor, Acadia University</p> <p>Bill Morneau contact details: As a Distinguished Fellow with the Munk School of Global Affairs &amp; Public Policy, he could be contacted at their UofT locations, at either of the following addresses:</p> <p>At the Observatory 315 Bloor Street West Toronto, Ontario, M5S 0A7 Canada (416) 946-8929 <a href="mailto:munkschool.315bloor@utoronto.ca">munkschool.315bloor@utoronto.ca</a></p> <p>At Trinity College 1 Devonshire Place Toronto, Ontario M5S 3K7 Canada (416) 946-8900 <a href="mailto:munkschool@utoronto.ca">munkschool@utoronto.ca</a></p> <p>As a board member with CIBC, he could be contacted at CIBC: 81 Bay Street, Toronto</p>	 <p>Bill Morneau Former Minister of Finance of Canada Distinguished Fellow, Munk School of Global Affairs &amp; Public Policy, The University of Toronto</p> <p>Bill Morneau served as Canada's 39th Minister of Finance from 2015 to 2020, Minister for Intergovernmental Affairs and Internal Trade from 2019 to 2020, and Member of Parliament for Toronto Centre from 2015 to 2020. He was also Governor at the International Monetary Fund and the World Bank. As Finance Minister, Morneau introduced the Canada Child Benefit, negotiated the expansion of the Canada Pension Plan, was a key member on the NAFTA renegotiation team, and led Canada’s economic response to the Covid-19 pandemic.</p> <p>Between 1990 and 2015, Morneau led the multinational human resources firm Morneau Shepell (now TELUS Health), building it to be Canada’s largest human resources firm. In 2021, he was Senior Fellow at the Jackson Institute at Yale University. In January 2023, he released his book <i>Where to From Here</i>, outlining his views on how Canadian economic policy can increase prosperity. He also co-authored <i>The Real Retirement</i>, a Canadian finance and retirement book. In 2012, as pension advisor to the Ontario government, he wrote the <i>Morneau Report: Facilitating Pooled Asset Management for Ontario’s Public Sector Institutions</i>, leading to the creation of the Investment Management Corporation of Ontario. <b>In 2014, Mr. Morneau founded a school for Somali and Sudanese girls in a UN Refugee camp</b></p>	<p><u>Giving:</u></p> <p>Nancy McCain and Bill Morneau:</p> <ul style="list-style-type: none"> <li>\$1M-\$4.9M to The University of Toronto (Cumulative, 2021)</li> <li>\$1M-\$4.9M to St. Michael's Hospital Foundation (Cumulative, 2021)</li> <li>\$500K-\$999K to the Art Gallery of Ontario Foundation (2009)</li> </ul> <p><u>Gift Announcement:</u></p> <p><b>\$1.3-million gift from Nancy McCain and Bill Morneau helps students</b> <b>The Morneau-McCain Scholars program will bring up to 25 young women from Kenya to complete undergraduate degrees at U of T’s Woodsworth College.</b> <i>UofT News, November 29, 2018</i></p> <p>At Woodsworth College in the University of Toronto, faculty, students and alumni believe that post-secondary education can be life-changing. For a select few graduates of the Morneau Shepell Secondary School for Girls in Kenya, this maxim is doubly true. Not only are they pursuing sponsored undergraduate degrees at Woodsworth; they will do so as landed immigrants who have the opportunity to build new lives in Canada. For the next five years, up to five young women will enter U of T each year, under the umbrella of the Morneau McCain Scholars program. Underwritten by a \$1.3-million gift from Nancy McCain and Bill Morneau, the project was created in partnership with the World University Service Canada (WUSC). The students’ degrees will be financed through a combination</p>

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		<p>Research is unable to confirm the best contact number.</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>Morneau and McCain are Toronto-based philanthropists <b>that have an interest in funding programs in Africa</b>. From a 2020 National Post article, the Morneau-McCain interest in African philanthropy was described in the following manner: <ul style="list-style-type: none"> <li>Morneau’s interest in Kenyan philanthropy predates his elected career. Morneau Shepell has been a large funder of the UN Refugee Agency, and in 2014 opened The Morneau Shepell Secondary School for Girls in Kakuma camp in northwest Kenya for refugees from Ethiopia, Somalia and South Sudan. The Morneau-McCain family has also funded a scholarship program at the University of Toronto for women from each graduating class, the first two of whom started in 2018.</li> <li>The same National Post article also described the McCain-Morneau family: <ul style="list-style-type: none"> <li>They have four children, all now young adults: Grace, Henry, Clare and Edward. The family sponsored Grace to Canada from Uganda ten years ago, when she was 14.</li> </ul> </li> </ul> </li> </ul> <p>See: <a href="https://nationalpost.com/news/politics/a-privileged-life-everything-you-need-to-know-about-embattled-finance-minister-bill-morneau">https://nationalpost.com/news/politics/a-privileged-life-everything-you-need-to-know-about-embattled-finance-minister-bill-morneau</a></p>	<p><b>in northern Kenya and is currently sponsoring a scholarship program for young women refugees at the University of Toronto.</b> He is past Chair of St. Michael's Hospital, Covenant House and the C.D. Howe Institute.</p> <p>Morneau currently serves as Chairman of NovaSource Power Services, Director at CIBC and at Clairvest, Chair of the Advisory Board of Magnet at Toronto Metropolitan University, Senior Advisor at BCG, Member of The Wilson Center’s Canada Institute Advisory Board, and with his wife Nancy McCain, is Co-Chair of the National Arts Centre’s The Next Act campaign.</p> <p>He holds an M.Sc. (Econ.) from the London School of Economics, an M.B.A. from INSEAD, and a B.A. from Western University.</p> <hr/>  <p>Nancy McCain Chancellor, Acadia University (Announced June 2024)</p> <p>McCain is currently engaged as the Co-Chair of the National Arts Centre Next Act Campaign, trustee of the Sobey Art Foundation, Director at the Canada Art Institute and the Council for Canadian American Relations, and Director Emerita of the National Gallery of Art Foundation. She recently completed her term as Chair of the Toronto Foundation. Her previous roles include Chair of the Arts Access Fund, President of the Power Plant Contemporary Art</p>	<p>of donations, grants and bursaries, and Woodsworth College will provide academic and social support.</p> <p>What’s the next step after building a school? Opening the door to university</p> <p>The Morneau McCain Scholars program grew out of the success of Morneau Shepell Secondary School for Girls, the first girls’ high school in the Kakuma Refugee Camp in northwestern Kenya. Established in 2014 by the Canadian human resources firm Morneau Shepell, the school offers an educational opportunity that can lead to economic self-sufficiency, giving young women options beyond early marriage.</p> <p>“We realized we could do something tangible that would make a real difference,” says Bill Morneau, now Canada’s Minister of Finance, and former chair of the firm. As the school flourished, it became clear to Morneau and his wife, Nancy McCain, that its graduates might have the opportunity to attend post-secondary school in Kenya, but as refugees, they wouldn’t be allowed to obtain formal work. “We were motivated to take the next step,” says McCain. “They worked so hard and had incredible resilience; they just wanted opportunities to succeed.”</p> <p>The couple were led to Woodsworth College through Lois Rowe, then principal of Havergal College in Toronto, and her husband, U of T’s Distinguished Professor Locke Rowe. Lois Rowe helped McCain and Morneau’s daughter, Clare Morneau, set up a pen pal program between Havergal and Morneau Shepell Secondary School, then made a fact-finding trip to Kakuma.</p> <p>“I met many young women who were driven and impassioned,” says Rowe. “They deserve a real and sustainable chance at long-term success, and that meant considering options that would allow study and work abroad.” She connected Morneau and McCain with WUSC, which</p>

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			<p>Gallery, and Co-Chair of the Canadian Art Foundation, as well as being a board member of Soulpepper Theatre Company, and a trustee for the Hospital for Sick Children. She is also President of the Morneau-McCain Foundation, where she spearheaded the Foundation’s work with the University of Toronto on an initiative to provide scholarships and permanent residency to girls from the Kakuma Refugee Camp in Kenya.</p> <p>Like many members of her extended family, McCain came from her hometown of Florenceville, NB to study at Acadia University. Soon after graduating in 1982 with a Bachelor of Arts, she attended the University of Grenoble and completed her Master of Arts Administration at New York University. McCain went on to pursue a career in the arts, working for Sotheby’s in London and New York and later at the Art Gallery of Ontario in Toronto. In 2021, Acadia bestowed her with an honorary Doctor of Humanities degree, and in 2023, she was the recipient of a Doctor of Laws, Honoris Causa from OCAD University. For 2024/25, McCain is an Advanced Leadership Initiative Fellow at Harvard University.</p>	<p>already had a program bringing refugee students to Canadian universities, including U of T. WUSC students receive a scholarship for their first year of university and are eligible for landed immigrant status as part of the program agreement; the Morneau-McCain Scholars program will follow a similar model.</p> <p>Locke Rowe suggested a partnership with Woodsworth, since the College offers the Millie Rotman Shime Academic Bridging Program for non-traditional students entering university, had previously welcomed Syrian refugees and also had experience working with international students from Africa through the Mastercard Foundation Scholars Program.</p> <p>The first two Morneau McCain Scholars arrived at U of T in the summer of 2018: one student from Somalia and one from South Sudan, countries ravaged by war. Woodsworth personnel have worked hard to help make the transition to life in Canada as smooth as possible, from welcoming balloons at the airport to peer support and academic assistance. Woodsworth’s dean of students, Liza Nassim, assembled a group of seven international volunteers — many of them from Africa — to help the students adjust to social life at U of T and Michelle Manks, a senior campus engagement manager for WUSC, conducted an introductory workshop. The young women also met WUSC and Mastercard Foundation students on campus. “We want them to feel safe, secure, and welcome and the volunteers are the key,” Nassim says. “But we also want to give them the freedom and opportunity to find their own way.”</p> <p>Janice Asiimwe, Woodsworth’s student life co-ordinator who is from Africa herself, says the summer support was “transformative.” “Initially, they were shy. Now, they are becoming more open. They are also more comfortable with things such as the money, transportation and technology. They’ve adjusted to the culture really quickly and they’ve had a great group to support them.”</p>

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RT	AF	Prospect Name	Background	Financials & Giving
9	7	<p>Kassam Family / The Moez Kassam &amp; Marissa Kassam Foundation</p> <p>Moez &amp; Marissa Kassam Foundation</p> <p>Established: 2016 Business Number: 756517322RR0001</p> <p>Contact Information: 201-155 University Ave, Toronto, ON, M5H3B7 Email: <a href="mailto:contact@2mkfoundation.com">contact@2mkfoundation.com</a></p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>The Kassam family has a strong connection to helping marginalized members of the community receive help and assistance, and <b>this includes support for those in need within the international community.</b> See the \$2.5M gift to help communities in India, Pakistan, Bangladesh and Sri Lanka. While Research did not find evidence of Africa-focused support, it could be a next area of consideration.</li> <li><b>Healthcare</b> – as well as <b>international</b> – are focus areas of the foundation.</li> <li>Note – that Moez Kassam is the Co-Founder and CIO of Anson Funds and has been in the news for his activities related to short-selling. This has caused him to run-afoul of the US’s SEC rules on this type of trading. In October 2023, his firm was handed a \$3.3M judgement in penalties and a return of profits for violations of American short-selling laws. This verdict is outlined in the following G&amp;M article:</li> </ul>	<p><u>Our Story</u> The Moez Kassam &amp; Marissa Kassam Foundation was established in 2016, to serve as the charitable platform for founders Moez Kassam and Marissa. Influenced by the immigrant experience, they both grew up in large close-knit families that prioritized relationships, the spirit of generosity, and a strong disdain towards injustice. Together, these are now values they share and work to pass on to their children Madelyn, Mila, Mikayla, and Milan.</p> <p><u>Our Mission</u> The Moez Kassam &amp; Marissa Kassam Foundation believes in an equitable world, where everyone has access to opportunities and no one is left behind.</p> <p>We focus on four priority impact areas – Food Security and Safe Housing, Healthcare and Research, Filling the Gap and Quality Education for Children, Leveled Fields of Play. We invest in organizations that address the symptoms of inequality and exclusion, while working to level the playing field. In 2023, Moez and Marissa established a \$1-million “Level the Playing Field Fund” dedicated to programs across the country that aim to eliminate barriers to sport for marginalized and immigrant communities.</p> <p><u>Our Priority Impact Areas:</u> The Moez Kassam &amp; Marissa Kassam Foundation works with allies that share our mission – which is anchored by three values:</p> <ul style="list-style-type: none"> <li>Community: We believe in the power of welcoming the stranger, because we are all better together.</li> <li>Opportunity: We commit to seeing and removing barriers to create pathways to possibility.</li> <li>Courage: We embrace doing what is right, and get behind visionary leaders, with bold ideas to solve intractable problems.</li> </ul> <p>Impact means results. We’ve identified four Priority Impact Areas that are outcome-focused and reflect pressing concerns in our community. These areas are Food Security and Safe Housing, Healthcare and Research, Filling the Gap and Quality Education for Children, and Leveled Fields of Play. We hold a deep commitment to breaking down systemic barriers to full inclusion.</p> <p>We know that our funding is just a tool that allows charitable organizations to do the critical work of helping, supporting, inspiring, and mentoring. Our aim is to be a helpful funding partner, that allows our grantees to shine.</p> <p><u>Key Persons:</u></p>	<p>The Moez Kassam &amp; Marissa Kassam Foundation:</p> <p><u>Interests:</u></p> <ul style="list-style-type: none"> <li>Food security</li> <li>Arts and culture</li> <li>Education</li> <li><b>Health care</b></li> <li>Immigration and settlement services</li> <li>Shelter services</li> <li>Immigrants, migrants &amp; refugees</li> <li>Canada</li> <li><b>International</b></li> <li>Direct Charitable Programming</li> </ul> <p><u>Financials:</u> Total Assets (2022): \$27,607,009 Total Gifts (2022): \$1,264,813</p> <p><u>Officers</u></p> <ul style="list-style-type: none"> <li>Moez Kassam, Co-Founder and Director</li> <li>Marissa Kassam, Co-Founder and Director</li> </ul> <p><u>Board Members</u></p> <ul style="list-style-type: none"> <li>Andrew Blott</li> <li>Sarah Fulford</li> <li>Hassan Valji</li> </ul> <p><u>Giving:</u></p> <ul style="list-style-type: none"> <li>\$1M-\$4.9M to the Toronto East Health Network - Michael Garron Hospital Foundation (Cumulative, 2021)</li> <li>\$100K+ to the University of Toronto (2019)</li> </ul> <p><u>Notable Gifts:</u></p> <p>\$1M to the Canadian Olympic Foundation in June 2023:</p>

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RT	AF	Prospect Name	Background	Financials & Giving
		<p>See:  <a href="https://www.theglobeandmail.com/business/article-anson-agrees-to-pay-us333-million-in-settlement-deal-with-us-regulator/">https://www.theglobeandmail.com/business/article-anson-agrees-to-pay-us333-million-in-settlement-deal-with-us-regulator/</a></p>	 <p>Moez Kassam            Co-Founder and CIO, Anson Funds            Co-Founder, The Moez Kassam &amp; Marissa Kassam Foundation</p> <p>Moez Kassam is a hedge fund manager, venture capitalist and entrepreneur. As co-founder and Chief Investment Officer of Anson Funds, he presides over \$1.5 billion in assets with exceptional results, regularly earning him a spot among the globe’s top performers by both Bloomberg and Barron’s magazines. Based on annualized returns from 2018 to 2020, Anson ranked among the Top 10 Hedge Funds by Barclay Managed Funds.</p> <p>Moez Kassam is also an active philanthropist. Moez Kassam sits on the advisory boards of the Toronto Library Foundation, the Canadian Olympic Foundation, Ryerson University’s Technology Innovation Circle, and the Immigrant Access Fund.</p> <p>He and his wife founded the Moez Kassam &amp; Marissa Kassam Foundation.</p> <p>Additional – his bio from Anson Funds is found here: <a href="https://ansonfunds.com/our-people/">https://ansonfunds.com/our-people/</a></p>	<p><a href="https://olympic.ca/press/canadian-olympic-foundation-announces-gift-from-marissa-and-moez-kassam-to-launch-level-the-playing-field-initiative/">https://olympic.ca/press/canadian-olympic-foundation-announces-gift-from-marissa-and-moez-kassam-to-launch-level-the-playing-field-initiative/</a></p> <p>\$2.5M to Mt Sinai to create the creation of a Neonatal Intensive Care Unit Fellowship to help communities in India, Pakistan, Bangladesh and Sri Lanka (May 2022):  <a href="https://www.newswire.ca/news-releases/sinai-health-receives-2-5-million-gift-to-bring-neonatal-expertise-to-the-world-875974530.html">https://www.newswire.ca/news-releases/sinai-health-receives-2-5-million-gift-to-bring-neonatal-expertise-to-the-world-875974530.html</a></p> <p>\$1M to Michael Garron Hospital Foundation to support its transformation in March 2021:  <a href="https://www.mghf.ca/your-impact/moez-marissa-kassam-foundation-donation">https://www.mghf.ca/your-impact/moez-marissa-kassam-foundation-donation</a></p>

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			 <p>Marissa Kassam Co-Founder, The Moez Kassam &amp; Marissa Kassam Foundation</p> <p>Marissa is Vice President of Philanthropy for Royal Bank of Canada Capital Markets (<u>Research suspects this is a former role</u>) and is responsible for managing the Capital Markets Donation budget and encouraging community engagement &amp; employee volunteerism. Before joining RBC in 2013, Marissa previously worked at J.P. Morgan in New York, Hong Kong and London. She was awarded the Bankers without Border volunteer opportunity in Uganda where she wrote a research report on mobile money for the Grameen foundation. She also spent a summer at Tech Stars in New York, an entrepreneurial bootcamp for 14 technology start-ups (1600 applicants) as they grow from early stage to venture-backed companies.</p> <p>She is a graduate of The Ross School of Business at the University of Michigan and now lives in her hometown, Toronto, with her husband Moez Kassam. Marissa’s proudest accomplishments are her 3 daughters, Madelein, Mila and Mikayla &amp; 1 son Milan.</p> <p>In 2020, Marissa completed an Executive Program in Social Impact Strategy at the University of Pennsylvania. She is the author of Goodnight Zoom, a free children’s book explaining the COVID-19 pandemic</p>	

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9	7	Sanjay Malaviya / Malaviya Foundation	 <p>Sanjay Malaviya Healthtech Entrepreneur Founder &amp; Former CEO, RL Solutions Board Member, SeamlessMD</p> <p>Sanjay Malaviya founded RL Solutions, a Toronto based patient safety software company, in 1997, and served as President and CEO from 1997 to 2019. During his tenure, he transformed RL Solutions from a one product company born out of a hospital IT department, to a leading provider of risk management, patient feedback, claims management and infection surveillance software to over 2000 healthcare organizations around the world. Sanjay’s continued leadership and vision has been instrumental to the growth of RL Solutions, culminating with an exclusive endorsement from the American Hospital Association for the company’s incident management solution, RL6:Risk, as well as 9 of the top 10 hospitals in the US counting themselves as RL Solutions clients. A graduate of the University of Waterloo, Sanjay has leveraged both his degree in Computer Engineering, as well as his almost decade of experience in a hospital setting, to offer a truly unique perspective on healthcare IT. To this day, he continues to be driven by his passion for making healthcare software not only cutting-edge, but also intuitive and easy to use for even the most casual user. While guiding the company to more than 15 consecutive years of profitability, Sanjay has never lost focus on the importance of positive employee engagement.</p> <p>The Malaviya Foundation: Most of our team met at a software company where the founding belief was that being good friends with our colleagues was good business. We put each other first and fostered a culture of respect and openness. In turn, that culture empowered us to take even better care of our customers while delivering an excellent product.</p>	<p><u>Giving:</u></p> <p>Sanjay Malaviya:</p> <ul style="list-style-type: none"> <li>\$100K-\$999K to the Canadian Olympic Committee (2018-2023)</li> </ul> <p>The Malaviya Foundation:</p> <ul style="list-style-type: none"> <li>\$1M-\$2.49M to the Canadian Olympic Committee (2018-2023)</li> </ul> <p><u>About the Malaviya Foundation:</u></p> <p>It does not have an entry in either Grant Connect or the CRA Charities Directorate.</p> <p>Note on the Malaviya Foundation’s website:</p> <ul style="list-style-type: none"> <li>Please note: Our Foundation is committed to causes and organizations to which we have a deep personal connection. While we appreciate anyone who would consider the Malaviya Foundation as a partner, we are not accepting donations or solicitations for donations at this time.</li> </ul> <p><u>Gift Announcement:</u></p> <p><b>The Malaviya Foundation Deepens Commitment to Olympic and Paralympic Medalists Ahead of Paris 2024 and Milano-Cortina 2026 with Team Canada Podium Awards</b> <i>The Canadian Olympic Foundation, May 16, 2024</i></p> <p><a href="https://olympic.ca/press/the-malaviya-foundation-deepens-commitment-to-olympic-and-paralympic-medallists-ahead-of-paris-2024-and-milano-cortina-2026-with-team-canada-podium-awards/">https://olympic.ca/press/the-malaviya-foundation-deepens-commitment-to-olympic-and-paralympic-medallists-ahead-of-paris-2024-and-milano-cortina-2026-with-team-canada-podium-awards/</a></p>

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			<p>It’s a belief that worked—very well. After we left the software company, we wanted to put that belief at the heart of the Malaviya Foundation. And the other members who have joined our team all believe in the same approach. So, here we are today: a small, collaborative group of accountable, empowered people, who want to keep our work fun, easy and, above all, impactful—for our partners, and for ourselves. We collaborate with those partners as a team to find the most effective ways to help good people do great things.</p> <p>Areas of support:</p> <ul style="list-style-type: none"> <li>• <b>Athletics:</b> <ul style="list-style-type: none"> <li>○ The thrill of competition, the spirit of camaraderie, the joy of winning: nothing brings us together like sports. The power of athletes to inspire greatness in young and old alike is unmatched.</li> <li>○ But it costs time, sacrifice, and dedication to perform at an elite level.</li> <li>○ That’s why we’re honoured to support Canadian athletes, from hometown heroes to international medalists. When our country takes gold anywhere in the world, the good grows even more back home.</li> </ul> </li> <li>• <b>Education:</b> <ul style="list-style-type: none"> <li>○ Climate, infrastructure, technology, medicine: today’s students are the engineers of tomorrow’s solutions.</li> <li>○ That’s why we fund key awards for remarkable engineering students—ones who hold the potential to make a lasting impact on the world.</li> </ul> </li> <li>• <b>Healthcare:</b> <ul style="list-style-type: none"> <li>○ <b>We support a select number of healthcare initiatives—from single donations of needed equipment to ongoing giving to specific research—in honour of those whose stories have forever transformed our own lives.</b></li> </ul> </li> </ul> <p><u>Additional details:</u></p> <p>Sanjay was born in Hespeler, ON in 1968 and attended Galt Collegiate Institute (In the Waterloo region). As a young boy, he moved to India with his family for three years, then returned to Hespeler. More details on his background are found in this 2014 bio: <a href="https://gci.wrdsb.ca/files/2014/11/stairway-posters.pdf">https://gci.wrdsb.ca/files/2014/11/stairway-posters.pdf</a></p>	

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RT	AF	Prospect Name	Background	Financials & Giving
9	7	<p>Wessinger Family</p> <p>Mike Wessinger Co-Founder &amp; Executive Chair (1995-present) PointClickCare</p> <p>Dave Wessinger Co-Founder &amp; Chief Executive Officer, PointClickCare</p> <p>Corporate Address: PointClickCare 5570 Explorer Drive Mississauga ON L4W 0C4 905 858 8885 www.pointclickcare.com</p> <p>Direct Contact Details: mike.w@pointclickcare.com (905) 858-8885 Ext. 230</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>Mike Wessinger is a <b>healthcare entrepreneur</b>.</li> <li>He was recently appointed (August 2023) as Co-Chair of the C100 – an organization to help the start-up eco-system involving entrepreneurs in Canada. He would be a great connector to other entrepreneurs in the advanced technology space.</li> <li>He does not have a significant track record of philanthropy; <u>it may be something he is planning to become more involved with in the future.</u></li> </ul>	 <p>Mike Wessinger Co-Founder &amp; Executive Chair, PointClickCare</p> <p>Mike Wessinger is PointClickCare’s Co-Founder and Executive Chair of the board. Prior to taking on the role of Executive Chair, Mike served as PointClickCare’s Chief Executive Officer from 1995 to 2021. Mike’s vision and leadership established PointClickCare as the first cloud-based health inforVentures quo, Mike’s forward-thinking vision drove the organization to level silos across the healthcare ecosystem, creating North America’s largest care collaboration network.</p> <p>In his role as Executive Chair, Mike continues to champion corporate culture, enhance governance, recruit diverse talent, and partner with internal and external boards and teams to solve critical healthcare challenges and propel PointClickCare forward as a world-class organization.</p> <p>Outside of PointClickCare, Mike is also Co-Chair of the C100 board of directors, where he actively leverages his years of experience to coach and mentor leaders at the helm of rapidly scaling tech companies. Mike was an EY Entrepreneur of the Year Finalist, and a Glassdoor Highest Rated CEO in 2017. The same year, PointClickCare was recognized as one of Canada’s Best Managed Companies by Deloitte.</p> <p>Education: Bachelor of Arts (Comm. &amp; Econ.), U. of Western Ontario</p> <p>In 2023, brothers Dave and Mike Wessinger prepared a video as 2023 Bloom Burton Award Finalists that features the company founders talking about their collaboration and how they were inspired by their mother Sheila McBride to get</p>	<p><u>Company Financial Details:</u></p> <p>Estimated Revenues: at least \$250 Million - \$500 Million/ annually. Estimated overall value of \$4B-5B. The company’s clients include nearly 60% of nursing homes in the US.</p> <p><u>Giving:</u></p> <p>Mike Wessinger:</p> <ul style="list-style-type: none"> <li>Under \$10K to the Heart &amp; Stroke Foundation of Canada (2016)</li> <li>Under \$10K to the Princess Margaret Cancer Foundation (2010)</li> <li>Under \$5K to CAMH (2019)</li> </ul> <p>Dave Wessinger:</p> <ul style="list-style-type: none"> <li>\$10K+ to the Centre for Addiction and Mental Health Foundation (CAMH) (2019 &amp; 2020)</li> <li>\$1K-\$9.9K to Heart and Stroke Foundation of Canada - Fondation Des Maladies Du Coeur Du Canada (2018)</li> </ul> <p>PointClickCare Giving:</p> <ul style="list-style-type: none"> <li>\$25K-\$49K to CAMH (Cumulative, 2021)</li> <li>\$10K-\$24.9K to the Boys and Girls Club of Canada (2021)</li> <li>\$10K-\$24.9K to the Arthritis Society of Canada (Cumulative 2023)</li> </ul>

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			<p>into the senior care health records space. She worked in senior care and had her sons work there so they had direct experience with the industry.</p> <p>The company’s value proposition with PointClickCare was its accessible fee structure for nursing homes and more efficient cloud-based computing technology.</p> <p>The video also talks about the impact of the COVID pandemic on elder care and how their software was helpful in aggregating key health data to provide important insights to nursing homes.</p> <p><u>Key Person:</u></p> <p>Mike Wessinger’s brother – Dave – is a co-founder in PointClickCare.</p>  <p>Dave Wessinger Co-Founder &amp; Chief Executive Officer, PointClickCare.</p> <p>Dave Wessinger is the Co-Founder and Chief Executive Officer of PointClickCare. For more than 20 years, Dave has worked to transform the senior care technology industry and tackle complex challenges across the healthcare continuum.</p> <p>In 2000, Dave co-founded PointClickCare with his brother Mike, pioneering healthcare’s digital transformation and driving improved outcomes for seniors and care teams through technology. Today, PointClickCare boasts one of Canada’s most admired corporate cultures and employs over 1,500 employees who currently serve over 26,000 care providers, establishing PointClickCare as the largest cloud-based healthcare platform in North America.</p> <p>Dave has earned recognition for the foresight and innovation that helps thousands reimagine the way technology can be used to communicate, collaborate, and improve care across the healthcare continuum. Instrumental in garnering recognition for PointClickCare as one of Deloitte’s best-managed companies for eight consecutive years, Dave also aided in earning PointClickCare a spot on Forbes Top Cloud 100 List for two consecutive years.</p>	

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9	7	<p>Dennis Kavelman Partner, Inovia Capital Board member, Kavelman-Fonn Foundation Founding Partner, CDL-Toronto and CDL-Oxford (CDL – Creative Destruction Lab)</p> <p>Inovia Capital: 130 Bloor St W #700, Toronto, ON M5S 1N5 (514) 982-2251 <i>Note – the firm appears to be headquartered in Montreal (but the address above is for the Toronto Office)</i></p> <p>The Kavelman-Fonn Foundation</p> <p>Established: 2007 Business Number: 843174418RR0001</p> <p>Contact Information 64 Forest Hill Road, Toronto, ON, M4V2L5</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li><b>Entrepreneur</b> that is currently involved in a number of organizations; some like AlayaCare and BenchSci, are both in the healthcare space.</li> <li>Operates a large foundation that includes <b>Healthcare as a focus.</b></li> <li>Note – his involvement with the Creative Destruction Lab will allow him to network with many other entrepreneurs and business leaders across the world.</li> </ul>	 <p>Dennis Kavelman Partner, Inovia Capital Kavelman-Fonn Foundation Founding Partner, CDL-Toronto and CDL-Oxford</p> <p>Dennis Kavelman joined Inovia Capital in 2018 to launch Growth Fund I with Chris Arsenault and Patrick Pichette and leads the Firm’s value creation strategy. Leveraging both the venture team’s insights and the growth team’s know-how, Dennis has been invaluable in overseeing dealflow management and crystalizing the investment team’s processes with the ultimate objective of maximizing impact and value to entrepreneurs. Thanks to his operational background, Dennis is well-recognized within the Canadian tech ecosystem for providing unique perspectives on managing operational hurdles and growing pains.</p> <p>Before joining Inovia, Dennis was an experienced technology executive and investor. After beginning his career at KPMG, Dennis joined startup RIM in 1995; as CFO and COO, he helped RIM create the global smartphone industry as it grew to over 14,000 employees by his departure in 2010. During his tenure at RIM, he managed the scaling of a global software, hardware and services business while overseeing all financing activities, including the IPO and over \$1.8B in equity raises. Following RIM, Dennis became a prolific angel investor and joined D2L, a global education platform company, as its COO. Dennis currently sits on the boards of AlayaCare, Symend, WorkJam, Vidyard and BenchSci; organizations where he has made investments.</p> <p><u>About the company:</u></p> <p>Inovia Capital is a full-stack venture firm that partners with audacious founders to build enduring global technology companies. We seek to transform venture capital by perfecting the craft of investing in people first. We roll up our</p>	<p>The Kavelman-Fonn Foundation:</p> <p>Interests:</p> <ul style="list-style-type: none"> <li>Education</li> <li><b>Health care</b></li> <li>Social Services</li> <li>Sports</li> <li>Children and youth (0 to 18 years)</li> <li>Kitchener / Waterloo</li> <li>Toronto</li> </ul> <p>Financials: Total Assets (2021): \$35,333,622 Total Gifts (2022): \$1,292,766</p> <p>Board Members</p> <ul style="list-style-type: none"> <li>Dennis Kavelman</li> <li>Scott Burk</li> </ul> <p>Contacts</p> <ul style="list-style-type: none"> <li>Karen Fonn</li> </ul> <p><u>Giving:</u></p> <p>The Kavelman-Fonn Foundation:</p> <ul style="list-style-type: none"> <li>\$1M-\$4.9M to the Golf Canada Foundation (2023)</li> <li>\$1M-\$2.49M to the Sinai Health System Foundation (Cumulative, 2019)</li> <li>\$250K+ gifts to such organizations as: Sunnybrook Health Sciences Centre Foundation &amp; to Sickkids (The Hospital for Sick Children) Foundation</li> </ul>

# Madiro Prospecting Chart (Summer 2024)

## July 22, 2024


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		<ul style="list-style-type: none"> <li>He is a contact of Rich Osborn (from the Vancouver event list shared with Research on July 16, 2024.</li> </ul>	<p>sleeves to serve founders with dedicated, long-term mentorship, a global talent network, and strategic support for global scale. Together, we rewrite the rules of complex legacy industries, push technology frontiers and pursue bold visions of a better future. Inovia Capital manages over US \$1B across five funds including early and growth stages, and holds offices in Montreal, Toronto, Calgary, San Francisco and London.</p>	
8	7	<p>John Francis Managing Director at Fraser Kearney Capital Corp.</p> <p>Best contact may be through LinkedIn: <a href="https://www.linkedin.com/in/john-francis-07987310/?originalSubdomain=ca">https://www.linkedin.com/in/john-francis-07987310/?originalSubdomain=ca</a></p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>Toronto-based <b>entrepreneur</b> and philanthropist.</li> </ul>	 <p>John Francis Managing Director at Fraser Kearney Capital Corp.</p> <p>John Francis is the Managing Director of Fraser Kearney Capital Corp., an investment company that oversees the Francis family office. Prior to forming Fraser Kearney, John was President and CEO of Trader Media Corporation for 16 years where he grew revenues to \$150 million from under \$10 million. Trader Media was a market leader in classified media, employing just under 2,000 employees in Ontario when it was acquired by Yellow Pages Income Fund in 2006. Prior to Trader Media, John worked as an Associate, Mergers and Acquisitions with Castle &amp; Cooke Inc., a public company controlled by Pacific Holding Company, the private Los Angeles based family office of David Murdock. Before moving to Los Angeles, John was an analyst in the Mergers and Acquisitions department at Goldman Sachs in New York. John serves on the advisory boards of Summerhill Venture Partners, a venture capital firm focused on mobility, digital media and saas, and Altas Partners, a private equity firm focused on longer horizon private investing across</p>	<p><u>Giving:</u></p> <p>John Francis:</p> <ul style="list-style-type: none"> <li>\$1M-\$4.9M to Golf Canada Foundation (2023)</li> <li>\$1M-\$2.49M to Foundation Western (1878 Western University) (Cumulative, 2017)</li> </ul> <p>John Francis and Susan Caskey:</p> <ul style="list-style-type: none"> <li>\$1M-\$4.9M to Sickkids (The Hospital for Sick Children) Foundation (Cumulative, 2017)</li> <li>\$1M-\$4.9M to Centre for Addiction and Mental Health Foundation (CAMH) (2016)</li> </ul> <p>Fraser Kearney Capital Corporation:</p> <ul style="list-style-type: none"> <li>\$1M-\$4.9M to Sickkids (The Hospital for Sick Children) Foundation (2015)</li> </ul>

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RT	AF	Prospect Name	Background	Financials & Giving
			various industries. He chairs the board of ScribbleLive, Inc., and is a director of National Salt Company Inc., portfolio companies of Summerhill and Altas respectively. He is a director and past Chair of the SickKids Foundation, a past trustee of The Hospital for Sick Children and a past governor of Havergal College. He also works actively in the early stage venture space volunteering as a G7 Fellow at the Creative Destruction Lab, an accelerator that provides mentorship, capital and networking to young entrepreneurs. Through this involvement he is an advisor to several early stage ventures and is a director of OTI Lumionics, Inc., an organic LED company. John was educated at the Western University’s Ivey School of Business (Honours Business Administration, with Distinction, 1986) and serves on their Advisory Board. John and his wife Susan Caskey live in Toronto and have three teenage children.	
8	7	<p>John Montalbano Director, AbCellera</p> <p>AbCellera Biologics Inc. 2215 Yukon Street Vancouver, BC V5Y 0A1 Office: 604.559.9005</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>Found when looking for Vancouver-based prospects.</li> <li>He is currently involved in venture capital, and sits on the board of AbCellera Biologics Inc, a <b>drug innovation company based in Vancouver.</b></li> <li>He has been involved in Windmill Microlending, an organization that raises money to lend to new immigrants to help get them credentialized for work in Canada.</li> </ul>	 <p>John Montalbano Director, AbCellera</p> <p>John Montalbano, retired CEO of RBC Global Asset Management and Vice Chair of RBC Wealth. He is the Principal of Tower Beach Capital Ltd. John serves as Director of the Canada Pension Plan Investments , Aritzia Inc., AbCellera Biologics Inc., Nicola Wealth Management, and Eupraxia Pharma. Non-profit service includes The Gairdner Foundation, <b>Windmill Microlending</b>, The Rideau Hall Foundation and St. Paul's Hospital Foundation.</p> <p>John began his career in 1988, at Phillips, Hager &amp; North Investment Management Ltd. - a Vancouver based firm, then managing \$3 billion in assets. While at PH&amp;N, he assumed successive leadership roles until his appointment as President in 2005.</p> <p>In 2008, the Royal Bank of Canada acquired PH&amp;N, creating a firm with over \$140 billion in assets under management, with leading positions in retail, high net worth and institutional asset management. John became CEO of RBC’s newly expanded asset management business, RBC Global Asset Management. By 2015, when he retired as CEO, "RBC GAM" had achieved top decile profitability and asset growth, with double digit annual growth in earnings. During the period of 2008 to 2015, RBC GAM extended its scope to include offices in the United States, the United Kingdom and Hong</p>	<p><u>Giving:</u></p> <p>John and Dana Montalbano:</p> <ul style="list-style-type: none"> <li>\$1M+ to BC Children's Hospital Foundation (Cumulative, 2017)</li> <li>\$500K-\$1.9M to Vancouver Public Library Board (2017)</li> <li>\$500K-\$999K to Emily Carr Institute of Art and Design Foundation (Cumulative, 2020)</li> <li>Unspecified donor to Social Venture Partners International (2020) – based in Seattle, Washington</li> </ul> <p>No giving found for Tower Beach Capital.</p>

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			<p>Kong, growing to more than \$370 billion in assets worldwide, with over a thousand employees, placing RBC GAM among the 50 largest asset managers worldwide. Moreover, RBC GAM was a partner in an asset management joint venture with one of China's largest retail banks. The success that PH&amp;N and RBC GAM achieved was due to a superb group of employees, investment professionals and management team, with a singular focus of putting the interest of clients first and whose day to day business practices were ethical above all else.</p> <p>John holds a Chartered Financial Analyst designation and a Bachelor of Commerce, with Honours, from the University of British Columbia (UBC). He is a Leslie Wong Fellow of the UBC Portfolio Management Foundation and also holds an Honorary Doctorate from Emily Carr University.</p> <p>About Tower Beach Capital:</p> <p>Tower Beach Capital is a private enterprise focused on venture capital investment.</p> <p>About AbCellera Biologics Inc.:</p> <p>AbCellera (Nasdaq: ABCL) discovers and develops antibody medicines for indications across therapeutic areas including cancer, metabolic and endocrine conditions, and autoimmune disorders. AbCellera’s engine integrates technology, data science, infrastructure, and interdisciplinary teams to solve the most challenging antibody discovery problems. AbCellera is focused on advancing an internal pipeline of first-in-class and best-in-class programs and collaborating on innovative drug development programs with partners.</p>	

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RT	AF	Prospect Name	Background	Financials & Giving
7	7	<p>Michael Serbinis Founder &amp; CEO, League</p> <p>Toronto Office: 225 King Street West, Suite 800 Toronto ON M5V 3M2 Canada Email: toronto@league.com Tel: 437-222-5555</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>Toronto-based <b>healthcare entrepreneur</b>.</li> <li>Does not have a considerable track record of past philanthropy; so it may be something that he is planning on moving towards in the future.</li> <li>He is a contact of Rich Osborn (from the Vancouver event list shared with Research on July 16, 2024.</li> </ul>	 <p>Michael Serbinis Founder &amp; CEO, League</p> <p>Michael Serbinis is the founder and CEO of League. With more than \$1B of exits, he is known as a visionary leader and entrepreneur who has built transformative technology and platforms across several industries. Serbinis worked alongside Elon Musk at Zip2 and founded and helped build Kobo, Critical Path, DocSpace, and now League. League is a technology-focused health company powering the digital transformation of healthcare. Employers, pharmacy retailers, healthcare providers and payors use the award-winning platform to deliver integrated and personalized health experiences that drive consumer engagement. Hundreds of thousands of people across the world use digital health platforms powered by League to access, navigate and pay for care.</p> <p>Serbinis is chair of the Board of Directors for the Perimeter Institute. He is also a member of the C100, the Business Council of Canada, a G7/ML7 Fellow of the Creative Destruction Lab, and a Board member for the MaRS Discovery District and the Vector Institute for Artificial Intelligence. In 2020 he was awarded the prestigious Region Builder Award by The Toronto Board of Trade.</p> <p><u>About League:</u></p> <p>Founded in 2014, League is a platform technology company powering next-generation healthcare consumer experiences. Payers, providers, consumer health partners and employers build on League’s healthcare CX platform to deliver high-engagement, personalized healthcare experiences consumers love. Millions of people use solutions</p>	<p><u>Giving:</u></p> <p>Mike Serbinis and Laura Adams:</p> <ul style="list-style-type: none"> <li>\$400K to the Perimeter Institute (2022) and \$100K-\$499K (2018)</li> <li>\$100K-\$249K to Branksome Hall (Cumulative, 2021)</li> <li>\$50K-\$99K to the Ontario Science Centre (Cumulative, 2021)</li> </ul>

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			powered by League to access, navigate and pay for care. League raised a \$95 million funding round led by TDM Growth Partners, backer of breakthrough platforms Square, Twilio and Slack, bringing the total funding to \$220 million.	
7	7	<p>Michael Hyatt/Hyatt Family Foundation Executive Chairman, DataStealth.io Principal, Hyatt Family Office</p> <p>Hyatt Family Foundation</p> <p>Established: 2011 Business Number: 832484083RR0001</p> <p>Contact Information: 4101 Yonge Street, Suite 502, North York, ON, M2P1N6</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>• Michael Hyatt is a <b>serial entrepreneur</b>.</li> <li>• <b>Healthcare is an interest of the foundation.</b></li> </ul>	 <p>Michael Hyatt Executive Chairman, DataStealth.io Principal, Hyatt Family Office</p> <p><b>Michael Hyatt is a serial entrepreneur and active investor.</b> He co-founded two highly successful tech firms that sold for over \$1 billion, is a founding partner of the Rotman School of Management’s prestigious Creative Destruction Lab, and a weekly business commentator for the CBC. A seasoned business leader, Hyatt equips audiences with the strategies and mindsets needed to become catalysts for growth and success in an ever-shifting business landscape. Hyatt was the co-founder and CEO of BlueCat — one of the largest private software companies in Canada — and the co-founder of Dyadem. He is currently the executive chairman of DataStealth, a fast-growing cybersecurity business, and a senior advisor to Northleaf Capital Partners. He has also invested in several startups, later-stage businesses, and private equity and venture capital firms.</p> <p>Previously a “Dragon” on CBC’s online sensation Next Gen Den, Hyatt is the host of Business Unplanned, a podcast that offers expert opinions and advice to entrepreneurs. He is also an investor on the hit Spotify podcast, The Pitch. In addition, Hyatt chairs the Hyatt Family Foundation, which focuses on women’s health, critical hospital research, and sponsorship of underprivileged minorities. Hyatt was awarded the “Power Partner Award” from Women of Inspiration for his supportive and innovative work for women in Canada and the developing world. He was named one of Canada’s “Top 40 Under 40”.</p>	<p>Hyatt Family Foundation:</p> <p>Interests:</p> <ul style="list-style-type: none"> <li>• Diseases and conditions</li> <li>• Cancers and tumours</li> <li>• <b>Health care</b></li> <li>• Life sciences</li> <li>• Markham / York</li> <li>• Mississauga / Peel</li> <li>• Oakville / Halton</li> <li>• Oshawa / Durham</li> <li>• Toronto</li> </ul> <p>Financials: Total Assets (2022): \$3,157,863 Total Gifts (2022): \$102,995</p> <p>Board Members</p> <ul style="list-style-type: none"> <li>• Nigel Hyatt</li> <li>• Susan Hyatt</li> <li>• Richard Hyatt</li> </ul> <p>Contacts</p> <ul style="list-style-type: none"> <li>• Michael Hyatt</li> </ul> <p><u>Giving:</u></p> <p>Hyatt Family Foundation:</p> <ul style="list-style-type: none"> <li>• \$250K-\$499K to the University of Toronto Rotman School of Business (Cumulative, 2017)</li> <li>• \$100K-\$249K to the Sinai Health System Foundation (Cumulative, 2019)</li> <li>• \$100K+ to Seneca College of Applied Arts &amp; Technology (2013) and \$25K-\$99K (2014 &amp; 2015)</li> </ul>

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			<p><u>About DataStealth:</u></p> <p>DataStealth is a Big Data Cybersecurity firm that Discovers, Classifies and Protects Sensitive Data and Documents.</p> <p>We are on a mission to revolutionize how organizations protect their data and documents. We are a team of cybersecurity and software experts who pride ourselves on our ability to stay ahead of the curve, constantly researching and incorporating the latest technologies to ensure our clients have access to the most advanced solutions in the market.</p> <p>DataStealth is the ultimate data protection platform in the event of a malicious insider, perimeter, or endpoint compromise. Instead of relying on protecting your network perimeter, DataStealth protects the data and documents inside your network from attacks from both external and internal sources.</p> <p>The patented DataStealth technology ensures that your sensitive data and documents are secure and adhere to all applicable privacy, regulatory, governance, and compliance requirements. DataStealth is a Big Data Cybersecurity firm that Discovers, Classifies and Protects Sensitive Data and Documents. We are on a mission to revolutionize how organizations protect their data and documents. We are a team of cybersecurity and software experts who pride ourselves on our ability to stay ahead of the curve, constantly researching and incorporating the latest technologies to ensure our clients have access to the most advanced solutions in the market. DataStealth is the ultimate data protection platform in the event of a malicious insider, perimeter, or endpoint compromise. Instead of relying on protecting your network perimeter, DataStealth protects the data and documents inside your network from attacks from both external and internal sources. The patented DataStealth technology ensures that your sensitive data and documents are secure and adhere to all applicable privacy, regulatory, governance, and compliance requirements. Cybersecurity.</p>	<p><u>Gift Announcement:</u></p> <p><b>Hyatt Family Foundation establishes annual bursary and award programs to help students</b> Seneca Year in Review (2013-2014)</p> <p>The Hyatt Family Foundation chose to support Seneca students through the establishment of annual bursary and award programs in 2013-14. Seneca is the first postsecondary institution to receive a gift from the Foundation. The Hyatt Family Foundation Award will assist a number of students with tuition and living expenses while the Foundation’s Bursary will provide a tuition assistance grant to 10 students each year. The Foundation is one of many successful Hyatt family collaborations. <b>For 20 years, the family has been a driving force in the technology sector, building two of the fastest growing companies in Canada. The Hyatts co-founded Dyadem, a successful risk assessment software company and BlueCat, a leading global provider of IP address management platforms.</b></p>

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7	7	<p>Reza Satchu            Founder &amp; Managing Partner            Alignvest Management Corp.</p> <p>1027 Yonge Street, Suite 200 Toronto, ON M4W 2K9            (416) 360-6390  <a href="mailto:info@alignvest.com">info@alignvest.com</a></p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>• Reza Satchu is an <b>entrepreneur</b> that has co-founded, built and managed a number of businesses.</li> <li>• He is a <b>McGill graduate</b>.</li> <li>• Note – as a member of the Next36 – and other entrepreneur-focused organizations, he may have a great network of people to engage.</li> </ul>	 <p>Reza Satchu            Co-Founder and Managing Partner            Alignvest Management Corporation</p> <p>Reza Satchu is the Managing Partner and CoFounder of Alignvest Management Corporation. He has a Bachelor’s degree in economics from McGill University and a Masters in Business Administration from Harvard University, which he received in 1996.            Reza Satchu began his career at Merrill Lynch in 1991 as a Financial Analyst, where he was responsible for structuring and executing high yield debt offerings and executed 10 completed transactions aggregating over \$3.5 billion in value. In 1996, he accepted a role and became a General Partner and Managing Director at Fenway Partners, a \$1.4 billion private equity firm.</p> <p>Over the course of his career, Reza Satchu has co-founded, built, and managed a number of businesses, including: Alignvest Management Corporation; KGS-Alpha Capital Markets, a U.S. fixed-income broker dealer with over \$10 billion dollars in assets, that was sold to Bank of Montreal for over \$400 million; StorageNow, which became Canada’s largest self-storage company prior to being sold to InStorage REIT for over \$100 million; and SupplierMarket, a supply chain software company whose investors included Sequoia and KKR that was sold to Ariba for over \$900 million. Continuing his desire to help the next generation of entrepreneurs, Mr. Satchu launched Canada’s first Academic Center for Entrepreneurship studies and business incubation, Next Canada. Programs launched under Next Canada include Next 36, Next AI and Next Founders. Next Canada’s mission is to increase Canadian prosperity while accelerating the trajectory of Canada’s most promising entrepreneurs.</p>	<p><u>Giving:</u></p> <p>Reza Satchu:</p> <ul style="list-style-type: none"> <li>• \$100K-\$999K to The University of Toronto (2015)</li> <li>• \$100K-\$499K to Next Canada (2015, 2016 &amp; 2017)</li> </ul> <p>Alignvest:</p> <ul style="list-style-type: none"> <li>• \$50K-\$99K to SickKids (2017)</li> </ul>

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			<p>From 2003 to 2010, Mr. Satchu developed and taught Economics of Entrepreneurship at the University of Toronto as an Adjunct Professor. In 2020, he began serving as a Senior Lecturer at Harvard Business School where he teaches Launching Technology Ventures and The Entrepreneurial Manager.</p> <p>Mr. Satchu served for 10 years as a director of the Toronto Hospital for Sick Children Foundation. He has been the recipient of Canada’s “Top 40 Under 40” Award, as well as the <b>2011 Management Achievement Award from McGill University</b>.</p>	
7	7	<p><b>There are two leads identified in this prospect row:</b></p> <p><b>Allan Lau</b> <b>Ivan Yuen</b></p> <p>Allen Lau, Wattpad Co-Founder and Executive Advisor, WEBTOON Brands</p> <p>Ivan Yuen Co-Founder, Wattpad</p> <p>Wattpad Toronto Office: 36 Wellington St E, Toronto, ON M5E 1C7 (416) 479-9694</p> <p><u>Additional Roles:</u></p> <p>Allan and Eva Lau:</p> <ul style="list-style-type: none"> <li>Allan and Eva Lau are both partners with Two Small Fish Ventures: <ul style="list-style-type: none"> <li>Two Small Fish Ventures (TSFV) was founded by husband and wife Allen and Eva Lau, who leverage their experience in building large-scale Internet companies to help other entrepreneurs build the next big thing.</li> <li>TSFV invests in primarily North American-based early-stage Internet</li> </ul> </li> </ul>	 <p><i>Allan Lau and Ivan Yuen</i></p> <p>Allen Lau, Wattpad Co-Founder and Executive Advisor, WEBTOON Brands</p> <p>Allen Lau is a visionary serial entrepreneur, a leader in Canada’s tech community, and a sought-after speaker and authoritative voice on entrepreneurship, the innovation economy, and the benefits of a diverse workforce. Allen is the co-founder of Toronto-based Wattpad, the global multi-platform entertainment company for original stories and leading social storytelling platform. In his previous role as CEO, Allen led an international team with the inspiring vision to leverage groundbreaking technology to fundamentally disrupt the entertainment industry while empowering diverse voices. After raising USD \$120 million from top VCs in Silicon Valley, New York, Canada, and Asia, in 2021 Wattpad was acquired by South Korean internet conglomerate Naver, in a deal valued at more than USD \$600 million; <b>one of Canada’s largest tech exits</b>.</p> <p>Today, as Executive Advisor to WEBTOON and Wattpad, Allen’s strategic counsel and world-renowned expertise is shaping the future of webnovels and new fiction formats.</p>	<p>Allen &amp; Eva Lau Family Foundation</p> <p><u>Details:</u></p> <ul style="list-style-type: none"> <li>The Foundation was registered in 2021.</li> <li>Allen is the President; Eva is Vice-President</li> <li>Note: Research indicates that the foundation has not yet made any gifts/granted any donations.</li> </ul> <p><u>Giving:</u></p> <p>Allan and Eva Lau:</p> <ul style="list-style-type: none"> <li>Under \$2.5K to Branksome Hall (2014 to 2020)</li> <li>Under \$1K and unspecified gifts to PMH and Hamilton Health Sciences Centre.</li> </ul> <hr/> <p>Yuen Family Foundation</p> <ul style="list-style-type: none"> <li>Giving information is unknown as the Yuen Family Foundation is a Donor Advised Fund at CANADA GIVES .</li> <li>In 2017, HAVEN Toronto (also known as the Good Neighbour’s Club) entered into a 5-year partnership with the Yuen Family Foundation for an undisclosed amount.</li> <li>The Yuen Family Foundation supports Elder Ventures, an investment company focused on aging.</li> </ul> <p><u>Giving:</u></p>

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RT	AF	Prospect Name	Background	Financials & Giving
		<p>companies with strong network effects.</p> <ul style="list-style-type: none"> <li>See: <a href="https://twosmallfish.vc/about">https://twosmallfish.vc/about</a></li> </ul> <p>Allen &amp; Eva Lau Family Foundation</p> <p><b><i>This organization is not presently engaged in grantmaking in Canada.</i></b></p> <p>Established: 2018 Business Number: 764551743RR0001 Contact Information: 1927 - 3230 Yonge St, Toronto, ON, M4N3P6</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li><b><u>Both Lau and Yuen are Toronto-based entrepreneurs.</u></b> They both appear to be edging into the worlds of formal philanthropy: the Allen and Eva Lau Foundation only started in 2021, and the Yuen Family Foundation is operating as a DAF with Canada Gives.</li> <li>In 2021, Wattpad’s acquisition for US\$660M marked one of the country’s biggest tech exits.</li> </ul>	<p>Under Allen’s leadership, Wattpad grew into a community of nearly 100 million people who have written more than a billion uploads on the platform. Thousands of Wattpad stories have been adapted for other platforms and gone on to become blockbuster movies and #1 Netflix hits, Emmy-nominated television series, and bestselling books around the world.</p> <p>Allen is a board member of the Toronto International Film Festival (TIFF), a cultural organization with a mission to transform the way people see the world through film. Allen also sits on the board of directors for MaRS Discovery District, North America’s largest urban innovation hub. As a board member, Allen joins MaRS in supporting high-growth startups and scale-ups to drive breakthrough discoveries, grow the economy, and make an impact by solving real problems for real people.</p> <p>A leader in Canada’s technology sector and startup ecosystem, Allen is a member of the Canadian Council of Innovators, a lobby group that advances the interests of Canadian technology companies at all levels of government. <b>He is also the co-founder of Two Small Fish Ventures, a fund that invests in early-stage internet companies with strong network effects.</b></p> <p>Allen received his Bachelor and Master degrees from the University of Toronto’s Electrical Engineering program. In 2020, he was inducted into the Engineering Alumni Hall of Distinction of the University of Toronto. He was twice named one of the Top 50 Most Influential People by Toronto Life.</p> <hr/> <p>Ivan Yuen Co-Founder, Wattpad</p> <p>Ivan Yuen is an accomplished serial entrepreneur based in Toronto, Canada. Ivan has a degree in computer engineering from the University of Waterloo and an MBA from the Rotman School of Management. He co-founded Wattpad, a platform that revolutionized the way people share and discover stories. Wattpad’s rapidly growing global influence in entertainment led to its acquisition by Naver, the South Korean internet giant, for more than USD\$600M. Ivan is an active investor with a focus in consumer software, platforms and marketplaces.</p> <p>Ivan is also the Founder / Principal Investor in Elder Ventures. He is excited about the learning and investing in new opportunities created by the growing longevity economy. He supports entrepreneurs who are building innovative technologies that help us lead longer, healthier, and more fulfilling lives.</p> <p>Ivan’s spouse is Dr. Camilla Wong; a staff physician (Geriatrician) St. Michael’s Hospital, Associate Scientist, Keenan Research Centre in the Li Ka Shing Knowledge Institute at St. Michael’s Hospital, and Associate Professor at University of Toronto.</p>	<ul style="list-style-type: none"> <li>No giving details for the Yuen’s could be confirmed</li> </ul>

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RT	AF	Prospect Name	Background	Financials & Giving
6	7	<p>Kanwar – Sharma Family</p> <p>Satish Kanwar Co-Founder, Good Future Former VP of Product Acceleration, Shopify</p> <p>Arati Sharma Co-Founder &amp; President, Good Future</p> <p>There are a number of means to make contact listed on the Good Futures website (LinkedIn, Instagram and an email link): <a href="https://www.goodfuture.com/">https://www.goodfuture.com/</a></p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>A couple – both <b>entrepreneurs</b> – and both were once involved in senior positions with Shopify.</li> <li><b><u>They are in the process of starting their philanthropic efforts in the area of impact investing</u></b> – called Good Future, it will include a philanthropic foundation.</li> </ul>	 <p><i>Arati Sharma and Satish Kanwar</i></p> <p>Satish Kanwar Co-Founder, Good Future Former VP of Product Acceleration, Shopify</p> <p>Satish Kanwar is the Co-Founder of Good Future, a family office investor and operator based in Toronto, Canada. Good Future is building a multidisciplinary community of entrepreneurs bonded by the desire to have a positive-sum impact on the world.</p> <p>Satish was previously the Vice President of Product Acceleration at Shopify, where he headed strategic acquisitions, investments, and alliances with mission-aligned companies. Over 10 years at Shopify, Satish led its expansion from online stores to multi-channel commerce across ecommerce, point of sale, mobile, and marketplaces, including partnerships with Meta, Google, TikTok, Amazon, and Apple.</p> <p>Before Shopify, Satish co-founded award-winning design studio Jet Cooper, which was acquired by Shopify in 2013 in order to establish its footprint in Toronto. Satish spearheaded the rapid growth of Shopify's operations in the city over its formative years.</p> <p>Satish a recognized leader in Canadian tech and business. He’s the Board Chair of BetaKit, Canada’s leading tech news publication, and a Board Director of Toronto Global, an investment attraction agency. He has also been named to Forbes' 30 Under 30 and Toronto Life's Most Influentials.</p>	<p><u>Giving:</u></p> <p>Satish Kanwar:</p> <ul style="list-style-type: none"> <li>\$5K-\$9.9K to Habitat for Humanity Greater Toronto Area (2018)</li> </ul> <p>Arati Sharma and Satish Kanwar:</p> <ul style="list-style-type: none"> <li>Unspecified gifts to Luminato, Toronto Festival of Arts and Creativity (2022)</li> </ul> <p>Arati Sharma:</p> <ul style="list-style-type: none"> <li>\$1K-\$4.9K to Centre for Addiction and Mental Health Foundation (2022)</li> </ul>

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RT	AF	Prospect Name	Background	Financials & Giving
			<p><u>Additional Details:</u></p> <p>Board Memberships:</p> <ul style="list-style-type: none"> <li>• Chair, Board of Directors, BetaKit <ul style="list-style-type: none"> <li>○ BetaKit is the publication of record for Canadian startup and tech innovation news, providing trusted and accessible business journalism. Our team and coverage span the country, offering breaking news and in-depth reporting across a variety of formats.</li> <li>Read by the people tracking, financing, and building the next generation of Canadian business, our purpose is to connect, interrogate, and inform Canadian tech.</li> </ul> </li> <li>• Member, Board of Directors, Toronto Global <ul style="list-style-type: none"> <li>○ Toronto Global forges meaningful connections between business, government, industry and academia, fostering a network that amplifies your business potential and propels you to new heights. Our mission at Toronto Global is to empower businesses like yours with the knowledge and tools to thrive, leveraging the limitless potential of this extraordinary region.</li> </ul> </li> <li>• Member, Board of Directors, Delphia <ul style="list-style-type: none"> <li>○ Delphia is the premier algo-advisor that helps people invest smarter together. Designed by a team of data scientists and academics, Delphia analyzes the personal data shared by its members to make intelligent investment decisions. By converting personal data into investment capital, Delphia aims to change the way we think about our data, investing, and the future of our economy. Delphia is headquartered in Toronto, Canada, with teams in New York, San Francisco, and London.</li> </ul> </li> </ul> <p>Education:</p> <ul style="list-style-type: none"> <li>• BBA, Co-op Specialist, University of Toronto Scarborough (2004-2008); Grade: Honours and High Distinction.</li> <li>• He is an Arbor Award recipient.</li> </ul> <hr/> <ul style="list-style-type: none"> <li>• Spouse: Arati Sharma (details below)</li> </ul> <p>Arati Sharma Co-Founder &amp; President, Good Future</p> <p>Arati Sharma is an entrepreneur, angel investor, and technology leader based in Toronto, Canada. She is the Founding Partner of Backbone Angels, an investor collective led by women executives from Shopify.</p> <p>Arati invests in companies and brands led by women and people of colour, with the aim of increasing representation and equitable access to resources for entrepreneurs of all backgrounds. She’s grown a portfolio of over 50 investments, including companies such as Willful, Kotn, Lilia, Three Ships, and Sheertex. She is also the Co-Founder of Ghlee, a modern-day beauty brand offering natural products rooted in South Asian tradition.</p>	

# Maduro Prospecting Chart (Summer 2024)

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			<p>Arati was previously at Shopify for nearly a decade, building key components of the marketing function from the ground-up as one of its first hires. She was the Director of Product Marketing, responsible for global go-to market strategy and campaigns for Shopify’s products and platform. Prior to that she led offline, experiential, and community marketing, and founded the company’s annual conference, Shopify Unite.</p> <p>When she’s not talking about founders or fashion, you can find her heads down in a new book, trying to keep her (many) plants alive, or spending time with her husband and son. Arati was named NACO Canada’s 2021 Angel of the Year.</p> <p><u>Additional Details:</u></p> <p>Arati is also involved with the following organizations:</p> <ul style="list-style-type: none"> <li>• Founding Partner, Backbone Angels <ul style="list-style-type: none"> <li>○ A collective of active angel investors coming together to invest in women and non-binary founders with a focus on investments in Black, Indigenous, and Women of Colour-led companies.</li> </ul> </li> <li>• Co-Founder, Ghlee <ul style="list-style-type: none"> <li>○ Co-Founder at Ghlee, a ghee-based skincare brand based in Toronto, Canada.</li> <li>○ Arati co-founded Ghlee with her brother.</li> </ul> </li> </ul> <p>Education:</p> <ul style="list-style-type: none"> <li>• Political Science, Faculty of Social Sciences, McMaster University, 2007</li> <li>• Winner of McMaster University’s Arch Award in 2022; which recognizes recent graduates.</li> </ul> <p>Full Citation: Arati Sharma ’07, Faculty of Social Sciences; 2022 Arch Award Recipient</p> <p>Arati Sharma is one of the 2022 winners of the Arch Award, the McMaster Alumni Association’s recognition of accomplished recent Mac grads. “This award is a little bit surreal to be getting because when I was at the University, I actually sat on the committee to pick the Arch Award,” Arati recalls. “I remember ... being so inspired by the people and what they were doing outside of school. I think reading the Arch Award submissions and nominations and then finally the people that we had selected in my year, I just saw so many different career opportunities that you don’t necessarily know of. ... But I think reading the Arch Award nominations, for me when I was younger, just really inspired me on things I could do, the impact that I could have on the world that was kind of outside of that typical route that you’re supposed to take.”</p> <p>Now, 15 years after graduating from McMaster, Arati is a terrific example of a graduate “outside of that typical route.” After graduating with a social sciences degree, she began her career as National Director of the Canadian Alliance of Student Associations before joining Jet Cooper Ltd., a user experience and design agency. Then she became one of Shopify’s earliest hires, eventually serving as Director of Product Marketing. When Shopify became</p>	

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			<p>a juggernaut, Arati started envisioning the next phase of her career. “You see this in tech hubs where early employees of large tech companies, they come into a large sum of money and they start investing in businesses and so we don’t necessarily get that in Canada, especially with the frequency that you see at other tech hubs.”</p> <p>Arati Sharma is now an angel investor and entrepreneur, most recently named Canada’s 2021 Angel of the Year by the National Angel Capital Organization (NACO). On the investing side, Arati co-founded Backbone Angels, a collective of women angel investors that are former and current Shopify executives. The group emphasizes providing support to start-ups led by people from under-represented communities. Arati says, “For me, I just look at people who are unexpected and overlooked and look at the stats and say, ‘If I can make a difference, if I can invest in their business – which is a great business opportunity – why not invest in entrepreneurs that are the less likely success story?’ ... That’s what keeps me going.” With investments in more than 50 companies, Arati’s approach seems to be working.</p> <p>Alongside her brother, Arati also co-founded Ghlee, a skincare company that develops its products based on the traditional South Asian ingredient ghee. She traces many of the lessons, skills, and perspectives she uses in her career back to her time at McMaster where she was one of the most involved students on campus. “What has served me really well in my career journey was actually work experience that I got at McMaster,” she says, citing, in particular her full-time work with the MSU as vice-president of education. “That ended up being the most invaluable experience because it was my first time having a full-time job, working with other people, working with team members, working with people who were much older than me as well. That changed the trajectory of what I wanted to do and how I wanted to work.”</p> <p><u>Additional Notes:</u></p> <ul style="list-style-type: none"> <li>In March 2022, the DMZ (Digital Media Zone) at TMU unveiled the inaugural winners of their highly anticipated annual award: DMZ’s Women of the Year. Arati Sharma, Founding Partner of Backbone Angels and Co-Founder of Ghlee – was one of the recognized Women of the Year.</li> <li>Both Satish Kanwar and Arati Sharma are listed as Directors with: <ul style="list-style-type: none"> <li>13718077 Canada Inc. (as of January 2022)</li> <li>Good Future Holdings Corp (as of April 2021)</li> </ul> </li> </ul> <p><u>About Good Future:</u></p> <p>Founded by Arati Sharma and Satish Kanwar in Toronto, Canada, Good Future is building a multidisciplinary community of entrepreneurs bonded by the desire to have a positive-sum impact on the world. Our thesis is entirely focused on people. We do not segment our portfolio by a particular industry, trend, or technology. Everything we do is about supporting those with unique visions for a better future that we believe should</p>	

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			<p>exist. Sometimes supporting means providing capital, other times it means listening, learning, and helping. <b>Our work today includes a micro venture fund, a philanthropic foundation, and majority-owned businesses.</b></p> <p><u>News:</u></p> <p><b>Ex-Shopify executives buy majority stake in tech industry news site BetaKit; Toronto-based Good Future has signed a partnership to hold the controlling interest in tech-industry publication BetaKit</b>  <i>The Globe and Mail</i>, November 28, 2023</p> <p>Two former leaders from Shopify Inc. are set to become the majority shareholders of tech-industry publication BetaKit and establish a new advisory board to maintain the Canadian media outlet’s editorial independence. Good Future, a Toronto-based venture fund and philanthropic foundation led by husband-and-wife duo Satish Kanwar and Arati Sharma, has signed a partnership to hold the controlling interest in BetaKit, the companies told <i>The Globe and Mail</i> ahead of a public announcement on Tuesday. Financial details were not disclosed. Mr. Kanwar will become interim chief executive officer and chair of the board of directors at BetaKit, while Ms. Sharma is joining its group of business advisers to work on its brand direction. Douglas Soltys, who has managed BetaKit for nearly a decade, will remain the publication’s editor-in-chief. Good Future will provide BetaKit with capital for growth, Ms. Sharma and Mr. Kanwar said. They would not reveal any figures for their investment, but said it would be utilized for enhanced editorial offerings, subscriber benefits and community initiatives to “better serve and engage Canadian tech.” BetaKit was founded in early 2012 by tech entrepreneurs Sarah Prevette and Erin Bury, operating under Postmedia Network Canada Corp. A year later, BetaKit was shut down abruptly, and Ms. Prevette left Postmedia. Soon after, MobileSyrup, another industry publication, bought BetaKit from Postmedia and relaunched the outlet. Mr. Soltys took over BetaKit in late 2014 and, by early 2016, spun it out as a stand-alone company. He will continue to hold a large equity stake in the business. “Over the last seven years, all sorts of misaligned parties have come calling, interested in what BetaKit could provide them,” Mr. Soltys said. “Satish and Arati are not those people: They are high-character individuals who believe in BetaKit’s mission.” Ms. Sharma and Mr. Kanwar were among the first few hires at Shopify. The duo joined the Ottawa-based company through an early acquisition of design agency Jet Cooper in 2013, years before its stock went public in the U.S. and Canada. They were both instrumental in building up Shopify’s strategic presence in Toronto. In 2021, Ms. Sharma left Shopify and became a founding partner for the women-led investor group Backbone Angels. And earlier this year, in July, Mr. Kanwar left Shopify after having been at the helm of the e-commerce company’s largest acquisitions, investments and partnerships with the likes of Meta, TikTok, Google and Amazon. Mr. Kanwar is currently on the board of directors for software company Delphia and not-for-profit investment agency Toronto Global.</p>	

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			<p>Mr. Soltys said there will be a “firm firewall” between BetaKit’s editorial and business interests, which he added that Good Future has been committed to since they started their conversations about a partnership.</p> <p>“Several of the tech publications I have worked for throughout my career no longer exist. I am obviously aware of the dire state of the Canadian news industry,” he said.</p> <p>“Satish and Arati are passionate about the impact journalism has on a community, as well as BetaKit’s approach of reporting on Canadian tech from within the ecosystem – not as outsiders.”</p> <p><b>LONG-TIME VP AND PRODUCT LEADER SATISH KANWAR DEPARTS SHOPIFY</b>            Betakit, July 25, 2023  <a href="https://betakit.com/long-time-vp-and-product-leader-satish-kanwar-departs-shopify/">https://betakit.com/long-time-vp-and-product-leader-satish-kanwar-departs-shopify/</a></p> <p>Long-serving Shopify executive Satish Kanwar is leaving the company after 10 years. The Shopify vice president (VP) of corporate development and head of product acceleration announced the news today on Twitter and LinkedIn, noting that he intends to spend more time with his family, angel investing, and working on his family office.</p> <p>“The end of this month marks my 10-year anniversary and last day at Shopify,” wrote Kanwar. “It’s impossible to express my gratitude for everything that is this place, people, and product, which has been my world for a decade.”</p> <p>Kanwar joined Shopify in August 2013 through its acquisition of design agency Jet Cooper, which Kanwar co-founded with Verne Ho in 2009. During his Shopify tenure, Kanwar helped the company grow from a promising Canadian tech startup to the e-commerce giant it is today while working in various product, operations, and corporate development leadership roles.</p> <p>Kanwar joined Shopify in August 2013 through its acquisition of Toronto-based Jet Cooper.</p> <p>“In 2013, Shopify had a bigger vision for Jet Cooper than we had for ourselves, so we built Shopify Toronto... and the rest is history,” wrote Kanwar.</p> <p>In a tweet reacting to the announcement, Shopify founder and CEO Tobias Lütke wrote, “A legend of Shopify riding into the sunset after a job well done. Sad and grateful.”</p> <p>Kanwar’s Shopify journey began with Jet Cooper, a Toronto-based user experience (UX) and design agency that catered to a range of fast-growing startups and established companies like Telus and Cineplex.</p> <p>In 2013, Jet Cooper was acquired by Shopify for an undisclosed sum. The strategic deal, designed to bolster Shopify’s design and UX capabilities, saw Jet Cooper’s 25-person team folded into Shopify. Kanwar came on as director of operations for Shopify’s Toronto office, while Ho joined the e-commerce firm’s ranks as director of design.</p> <p>Lütke told the Financial Post in 2013 that while Shopify had faced no difficulty sourcing engineers, it was finding design talent harder to come by. Shopify bought Jet Cooper and tasked it with improving the look and feel of the e-commerce firm’s online stores. In a statement made at the time, Lütke said the Jet Cooper acquisition brings “some of the best designers in the world” to Shopify.</p>	

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			<p>Back in 2013, Shopify was a privately-held primarily Ottawa-based company with nearly 300 employees. Since Shopify’s existing Toronto office was smaller than Jet Cooper’s team, they moved into the latter’s office, where Kanwar helped establish Shopify’s research and development presence in the city.</p> <p>Since then, Kanwar has served in a variety of roles at Shopify, including sitting at the opposite side of the table as Shopify bought other firms, like Toronto-based mobile studio Tiny Hearts.</p> <p>After working for 12 months as Shopify’s director of operations in Toronto, Kanwar served as director of product for almost two-and-a-half years. In this timeframe, Shopify went public on the Toronto Stock Exchange and New York Stock Exchange after raising \$131 million USD at a \$1.27 billion valuation.</p> <p>Following that, Kanwar briefly held the role of VP of product before transitioning to general manager and VP of product for channels. During his nearly three years in that position, he oversaw a variety of Shopify offerings, from online store and checkout to retail point-of-sale, multi-channel platform, product partnerships, and email and marketing tech, while also helping the company handle its relationships with players like Facebook and Google.</p> <p>Months into the COVID-19 pandemic, in November 2020, Kanwar became VP of corporate development and head of product acceleration, where he led the firm’s merger and acquisition, investment, and product alliance efforts. Since then, Kanwar has helped Shopify purchase and invest in a wide variety of companies that support its merchant ecosystem.</p>	
6	7	<p>Cameron Piron President, Cofounder and President Synaptive Medical</p> <p>Synaptive Medical 555 Richmond Street West Suite 800 Toronto, ON M5V 3B1 Toll Free: 844.462.7246 Toronto: 647.925.3435 Fax: 888.650.5230</p> <p><u>Research Notes:</u></p> <ul style="list-style-type: none"> <li>Found when reviewing the prospects that may be connected to the names from the Vancouver dinner list shared on July 16, 2024. He is a strong connection to Doug Janzen.</li> </ul>	 <p>Cameron Piron President, Cofounder and President Synaptive Medical</p> <p>Cameron Piron is an industry-recognized leader and innovator in image-guided surgery. Prior to co-founding Synaptive Medical, Cameron was President and Co-Founder of Sentinelle Medical, a medical device company that developed and</p>	<p><u>Giving:</u></p> <p>Cameron Piron:</p> <ul style="list-style-type: none"> <li>Under \$5K to The Toronto Symphony Orchestra (2011 &amp; 2012)</li> <li>Under \$1.2K to the Toronto International Film Festival Inc (2014) and unspecified gift (2014)</li> <li>Under \$300 to the Stratford Shakespearean Festival of Canada (2013)</li> </ul> <p>Synaptive Medical</p> <ul style="list-style-type: none"> <li>\$10K-\$24.9K to The Princess Margaret Cancer Foundation (2018)</li> <li>\$5K-\$24.9K to the VGH &amp; UBC Hospital Foundation (2017 &amp; 2019)</li> <li>Under \$10K to the Swedish Medical Center Foundation (2016)</li> </ul>



