Annual Report 2026

Philantra Foundation™



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Executive Summary

In 2026, Philantra continued its growth across Canada and strengthened its role as a strategic partner in philanthropy. By helping donors structure, manage and put their philanthropic commitments into action, Philantra turns charitable intentions into meaningful impact.

The year was marked by growth in **assets under management** and **charitable giving** and the organization's capacity to act, supported by an expanded team and a network of committed partners. This progress reflects the trust placed in Philantra and the strength of its model.

The **results** demonstrate broad impact at every level. Contributions supported local, provincial, national and international initiatives in essential fields. At the same time, awareness-building efforts amplified the reach of these initiatives, mobilizing more individuals and organizations around the causes being supported.

The stories featured in this report illustrate the tangible value of that commitment: projects that create lasting change, are rooted in communities and respond to real needs.

Building on these results, Philantra continues to move forward with ambition. The Foundation will continue to expand its impact, strengthen its partnerships and further position philanthropy as a catalyst for social change.

Opening Remarks

Reflections on Philantra’s Evolution

After nearly 10 years of dedicated and diligent leadership, Isabelle Fecteau stepped down from her role in April and passed the chairmanship of the Philantra Foundation’s Board of Directors to Delphine Pittet. Also one of the Board’s pioneering members, Delphine will focus on bringing the Governance Committee’s work to completion, with the objective of strengthening Philantra’s foundations as the organization continues to grow.

On behalf of the Board of Directors and National Bank Trust, we extend our sincere thanks to both women for their commitment, generosity and invaluable contributions.

We recognize that the Philantra Foundation is entering a period focused on consolidating the growth it has achieved. Our clients continue to move forward alongside us, and we receive many testimonials from beneficiary organizations. Contributions continue to increase, planned gifts are becoming more frequent, and we regularly hear positive feedback about the Foundation’s impact and the role of its contributors within the philanthropic ecosystem. Comments from members of the Board of Directors and our National Bank partners also confirm that the Philantra team continues to carry out its mission with dedication and care.

When our clients tell us that they are giving more because they have a better understanding of their capacity to give, we know that the Foundation is fully achieving its purpose. When an organization shares the tangible benefits of our guidance, we see the full value of Philantra’s role as a liaison between donors and organizations. Finally, when the Board of Directors and the Philantra team remain committed, and in the face of growth and the challenges it brings, we know that Philantra is firmly established and well positioned for the future.

We thank the members of the Philantra community for bringing their strengths together and for the trust they place in us.





Isabelle Fecteau and Delphine Pittet
Former Chair and Chair of the Board of Directors of the Philantra Foundation, respectively

Opening Remarks

Giving with Purpose, Creating Lasting Impact

Another wonderful year is drawing to a close, marked by the continued growth of the Philantra community, bringing together donors and the organizations they support, and the remarkable impact of that collective commitment across Canada and around the world.

The guidance we provide helps our clients identify the most effective ways to make a difference, enabling them to act with agility, diligence and care wherever their interests meet increasingly pressing needs.

Giving strategically, thoughtfully and sustainably, as Philantra clients are supported in doing, means transforming an intention into tangible and measurable results, and into solutions, progress and relief. A compelling video produced this year brings this approach to life.

With these stories of high-impact philanthropy in mind, I want to express my deepest gratitude to our clients for their remarkable generosity and to tell them how privileged we are to support them in their philanthropic journey every day.



Geneviève Beauchamp
President, Philantra Foundation

Philantra's Growth





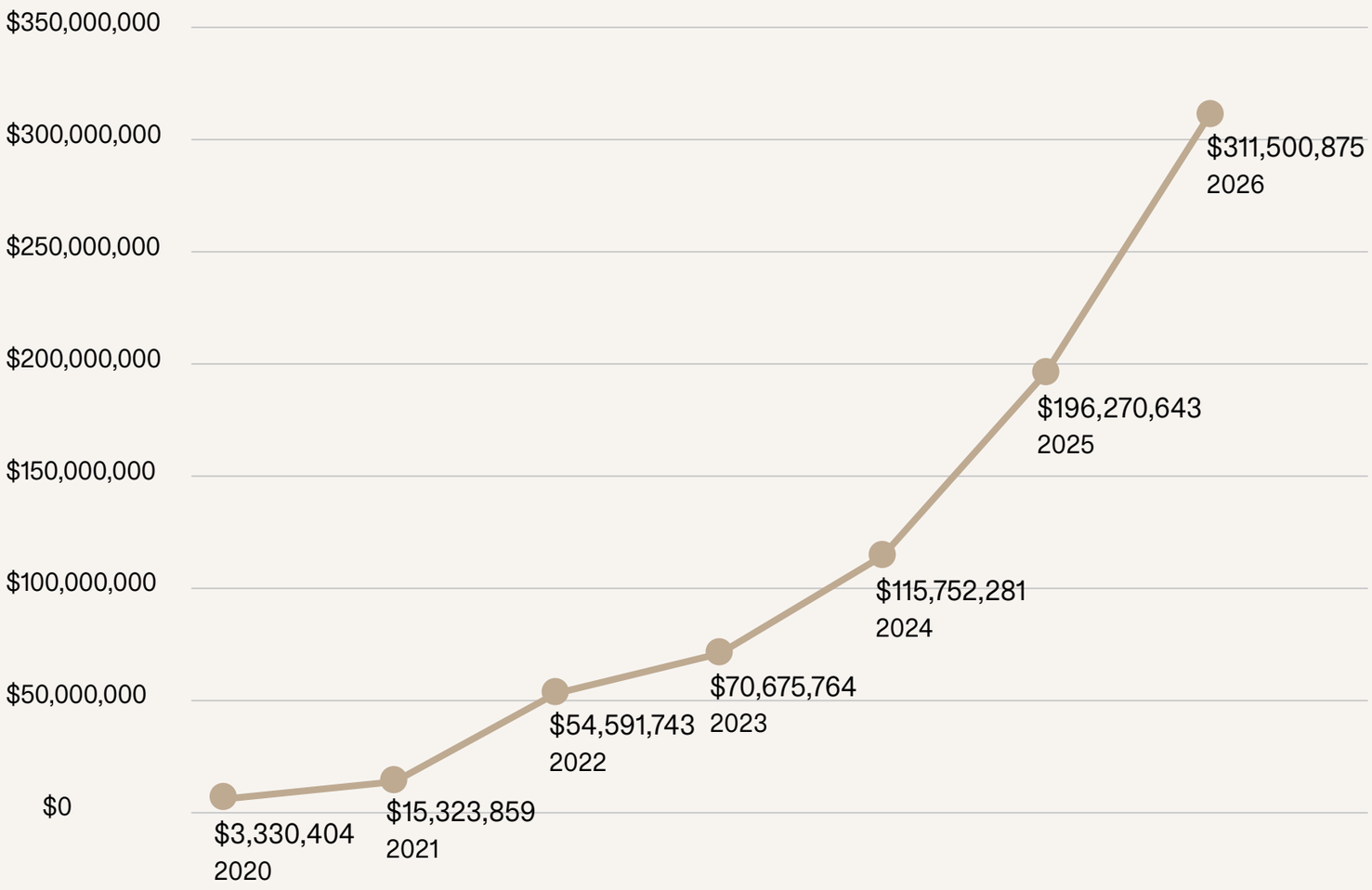
A Vision for Growth

Delivering an exceptional donor experience is just as important to Philantra as expanding its capacity to support meaningful philanthropic action. This dual objective matches the ambition of the diverse philanthropic and community circles that Philantra brings together and supports across Canada. Maintaining this balance is the key to a promising future.

With assets of more than $300 million*, Philantra is experiencing very strong growth. The Foundation has built solid, lasting foundations. It brings together a dynamic community of engaged donors.

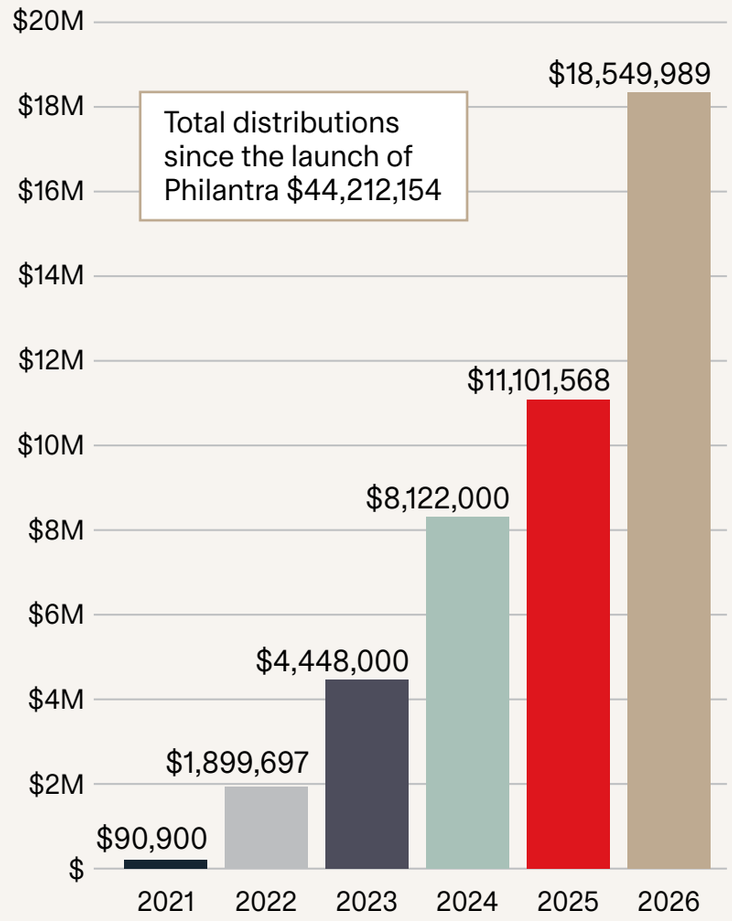
* As at June 30, 2026.

Assets under management



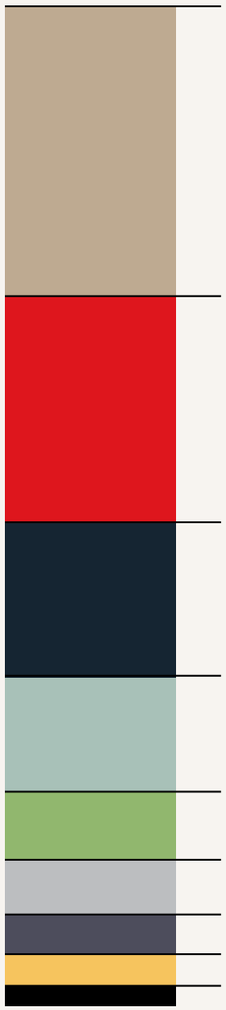
Data as at June 30, 2026

Distributions to organizations



Distributions

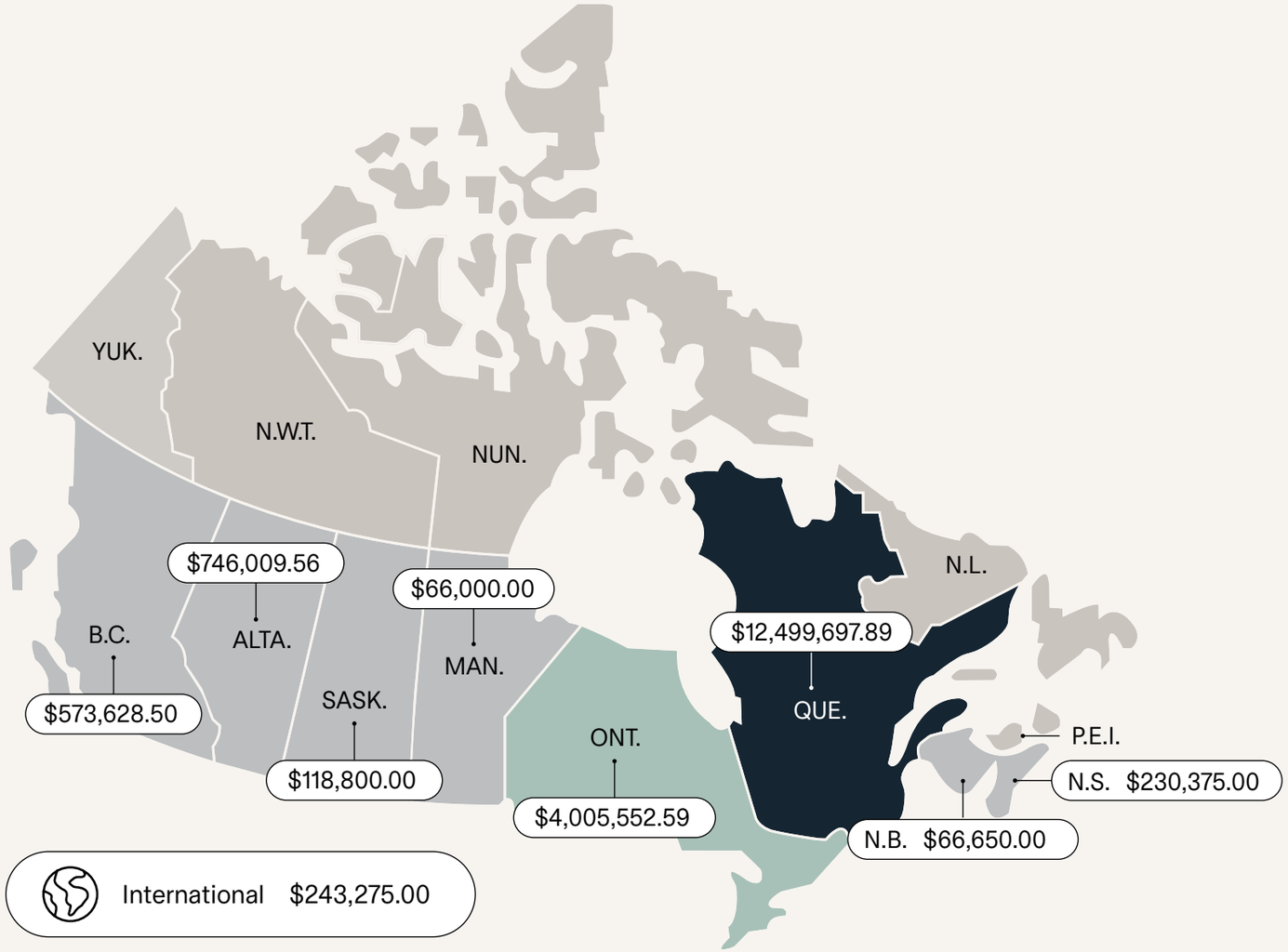
By sector



- Health $5,363,729.03
- Poverty relief $4,225,628.14
- Education $2,871,139.92
- Community $2,115,920.35
- Environment/animals $1,267,438.10
- Arts $1,014,745.10
- Resources/support $752,665.90
- Sports $577,950.00
- Religion $360,772.00

Data as at June 30, 2026

By province and territory



Note: The allocation is estimated based on organizations' registered addresses and our team's knowledge of the intended allocation of distributions. The actual allocation and use of funds may vary slightly.

2026 Results



Financial summary

(Summary)

Results

for the year ended June 30, 2026

	2026	2025
REVENUE	**$**	**$**
Net investment income	33,535,110	14,955,752
General contributions	18,324,989	11,101,568
Contributions from a corporation	187,344	100,883
Total	**52,047,443**	**26,158,203**

	2026	2025
EXPENSES	**$**	**$**
Contributions to registered organizations	18,549,989	11,101,568
Administrative expenses assumed by a corporation	187,344	100,883
Investment management fees	1,518,095	976,792
Withholding taxes	3,784	3,242
Other	139,963	91,962
Total	**20,399,175**	**12,274,447**
Excess of revenue over expenses	**31,648,268**	**13,883,756**

Financial summary

(Summary)

Financial position

as at June 30, 2026

		2026	2025
ASSETS		**$**	**$**
Current	Proceeds receivable from sale of investments	15,775	1,155,087
	Contributions receivable	3,700,000	4,000,000
	Endowment contributions receivable		10,000,000
	Subtotal	3,715,775	15,155,087
Long-term	Investments	307,785,100	181,115,556
	Total	**311,500,875**	**196,270,643**

		2026	2025
LIABILITIES		**$**	**$**
Current	Accounts payable and other operating liabilities	1,461,841	881,486
	Investments payable	224,454	662,626
	Current portion of deferred contributions	8,578,782	5,387,231
	Subtotal	10,265,077	6,931,343
Long-term	Deferred contributions	234,526,653	154,278,423
	Total	**244,791,730**	**161,209,766**

		2026	2025
NET ASSETS		**$**	**$**
	Endowment funds	10,038,342	10,000,000
	Unrestricted	56,670,803	25,060,877
	Subtotal	66,709,145	35,060,877
	Total	**311,500,875**	**196,270,643**

Stories of Growth



Editorial Note

The stories featured in this section reflect the experiences and perspectives shared by the donors and beneficiary organizations involved. To preserve the authenticity of these testimonials, their original voice, style and wording have been retained. In some cases, excerpts have been shortened or lightly edited for clarity, editorial consistency or layout purposes. The inclusive writing principles applied to the report's institutional content do not apply to these testimonials.



Technical Equipment Purchase Project

From the perspective of the anonymous donors

"Like many others, our families have been deeply affected by serious illnesses. We became interested in philanthropy, initially to better understand these illnesses and contribute to finding answers. We then made donations in various areas to improve or support what we consider important aspects of our community.

After seeing several excellent North Vancouver Community Players productions and observing how well the organization is managed, we wanted to help ensure that it remains an affordable, volunteer-led arts and entertainment resource. Philantra helped us connect with the organization, identify its needs and find a way to help."

"We hope our donation will be seen as an expression of our love and support for this wonderful artistic community, and that our community will continue to enjoy performances there for decades to come."

Technical Equipment Purchase Project (continued)

From the perspective of the beneficiary organization, North Vancouver Community Players

“Since 1952, North Vancouver Community Players has showcased local talent through a broad repertoire of plays.

Our home is The Theatre at Hendry Hall, built in 1942. For years, we had identified an urgent need for a range of headsets and monitors to maintain constant, reliable communication between teams. The equipment we were able to purchase through a generous donation will not only support smooth operations, but also improve volunteer safety. The Philantra donor’s support has made this long-awaited technical upgrade a reality.

“One of the things that makes theatre exciting is that anything can happen,” says President Rosemary Hundal. “The donor is doing something wonderful for us. Thank you for helping us create a safe environment and enabling us to improve the high-quality productions for which we are known in the community.”



Transformative Affordable Housing Project

From the perspective of the anonymous donor

“Shortly after I retired, I took part in a survey to identify the main needs of people in our community. The need for more affordable housing emerged as a priority. This led me to join our local chapter of the Alliance to End Homelessness, to advocate for the issue at the municipal and county levels.

When a promising property was listed for sale, Redwood Park Communities’ agreement to assume all development and ownership responsibilities was the key factor that moved the project forward. Redwood is a non-profit organization with a proven record of creating and managing affordable housing throughout the county.

In this particular case, Philantra helped by advising me on directing funds toward the purchase of the property and by facilitating their timely transfer to Redwood.”

“The project shows that meaningful change can be achieved relatively quickly. I hope this small-scale project will encourage others to take advantage of the many opportunities that exist to gradually increase the amount of affordable housing in our community.”

Transformative Affordable Housing Project (continued)

From the perspective of the beneficiary organization, Redwood Park Communities

“Since 2009, Redwood has created people-centred supportive housing solutions as essential infrastructure for strong, healthy communities: homes that provide stability, connection and opportunity.

The need for deeply affordable, supportive housing continues to increase across Canada and Ontario. Simcoe County is no exception. The longer a person experiences the trauma of homelessness, the more intensive the support they will need to recover successfully.

The Philantra philanthropic fund that supported us made a donation toward the purchase of a property in Orillia. This allows us to provide six new permanent, affordable and supportive housing units. This would not have happened without the donor’s initiative.

The donor has been a well-informed, outspoken affordable housing advocate for several years and an early supporter of our YIMBY campaign. We are very grateful that they recognize this need in our community and are choosing to partner with Redwood in this way to address it.”



Photo courtesy of François Caron.

Scholarship Program to Support Dreams

From the perspective of François Caron, donor

“My journey has been marked by many challenges, including bullying. Despite these obstacles, I held on to a dream that seemed out of reach: becoming an entrepreneur. At the age of 20, I seized the opportunity to start a business and embarked on a journey that would transform my life.

With the guidance of experts, I was able to clarify my vision and purpose: to inspire others to reach their full potential and help young people believe in themselves.

This reflection led to the development of a structured philanthropic approach focused on creating lasting impact.

Over time, I came to understand that my greatest wealth lay in the people who believed in me. That deep sense of gratitude inspired my philanthropic commitment and led me to bring greater purpose to my actions.

It was in this spirit that the *Rêve de fou* movement was born. It celebrates the boldness, resilience and perseverance of thousands of young people throughout the Saint-Jérôme region.”

“And if the young people we support today go on to achieve their own boldest dreams, then one day choose to reach out to someone else and give back to their community, we will have accomplished something truly lasting.”

Scholarship Program to Support Dreams (continued)

From the perspective of the Fondation de l'Université du Québec en Outaouais, one of the recipient organizations

479 young people submitted applications to share their dreams

81 recipients were selected across all beneficiary organizations

+800 people attended the major celebration of personal achievement at the Théâtre Gilles-Vigneault in Saint-Jérôme.

"Beyond the financial barriers to accessing university education, we wanted to create an initiative that would bring people together and demonstrate a shared commitment to supporting the next generation in the Laurentians.

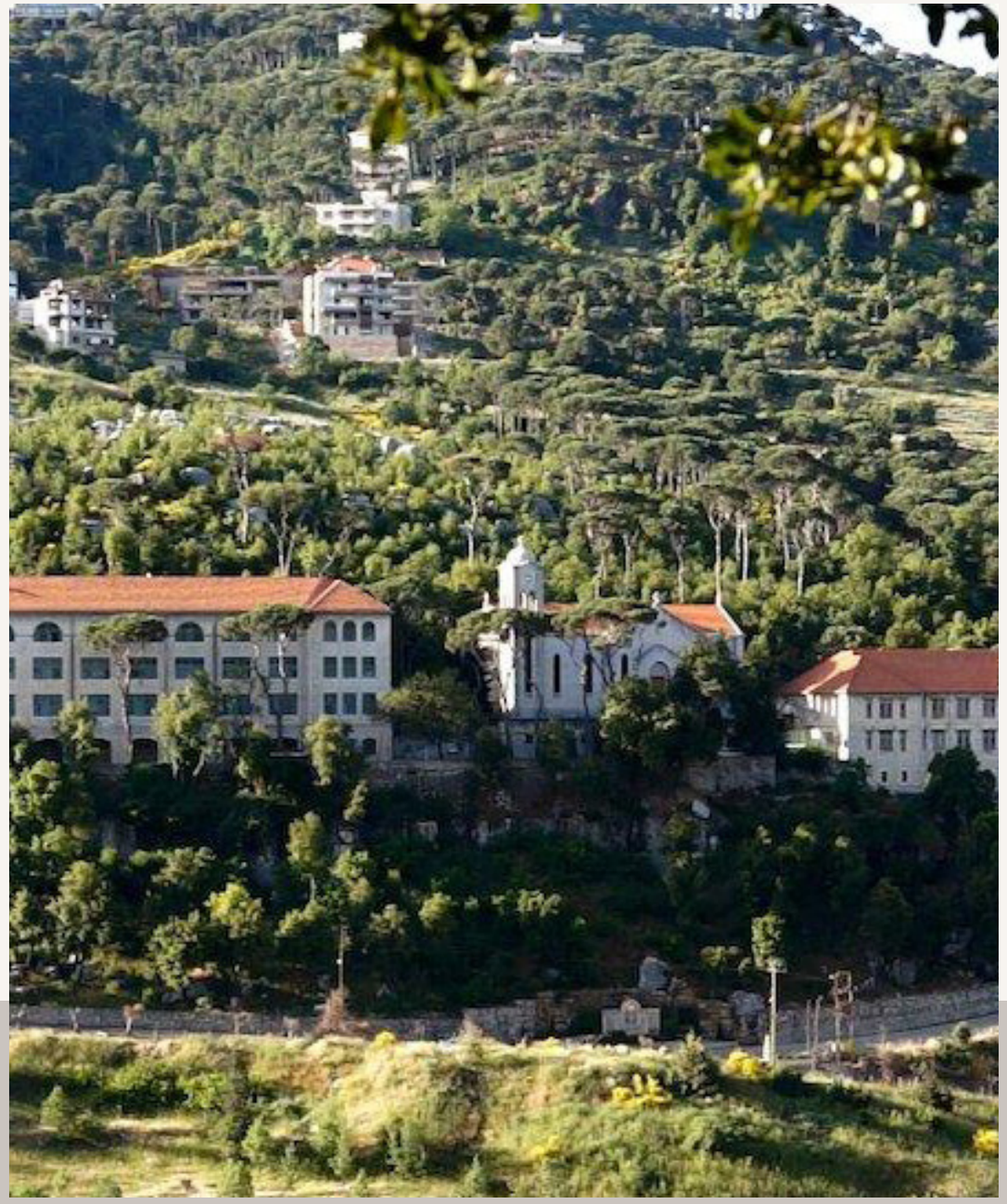
The *Rêve de fou Scholarships* were born from the dream of François Caron, who has a philanthropic fund with Philantra, and from a collaboration involving the Fondation de l'UQO, Cégep de Saint-Jérôme, and the region's public and private secondary schools.

Beyond financial assistance, the scholarships recognize inspiring journeys that are not always highlighted by traditional academic criteria."

"Behind every dream is a person who simply needs to hear: 'We believe in you.' The *Rêve de fou Scholarships* show that when philanthropy brings partners together around a shared vision, it opens up possibilities, nurtures aspirations and helps build the future of an entire generation."

– Isabelle Morin
Executive Director

Data as of June 30, 2026



Source: Vitalis St John, Lebanon's first integrated Healthcare and Seniors Daycare - Myriad Canada - International philanthropic network that brings together donors, philanthropists, and organizations.

Community Health Clinic

From the perspective of the anonymous donor

"Philanthropy has always been an unstated goal in my life journey. Long before I became actively involved in it, I was driven by the conviction that the true definition of success is when you give back to society.

This project is close to my heart because it addresses real, often invisible needs, hidden behind the misleading perception that everything is fine in my region, as well as in rural areas that are too often neglected.

Philantra got involved at a key moment before work began in May 2024, as the project in Lebanon was facing significant challenges related to a complex landscape and the need to ensure funds were used in a disciplined and transparent way.

I am particularly proud to have contributed to implementing a model that can be reproduced and measured, capable of generating a concrete and lasting impact, even in a complex environment like Lebanon."

"The value of a life's journey is measured by the dignity it enables us to offer others. When resources, discipline and vision come together, they have the power to quietly transform lives."

Community Health Clinic (continued)

From the perspective of the beneficiary organization, Rise4Life

Eight months after the start of the project

286	General practitioner consultations	372	Patients who received medication
443	Specialist consultations	200	People who received the flu vaccine
53	Dental consultations	187	Visits during a free medical day

“The donation supports Rise4Life’s humanitarian programs, which provide a wide range of services to vulnerable people and families in Lebanon, helping them access essential amenities and emergency care.

Before this project, the growing number of beneficiaries needing our assistance was stretching our resources to the limit and preventing us from responding effectively to all urgent needs.

The donation helped us reach more beneficiaries, improve service offering and provide timely assistance.”

Data as at April 27, 2026

Outreach and Visibility



The Philantra Foundation now has a well-established identity within the philanthropic community. A growing number of opportunities are emerging for it to raise its profile, communicate messages tied to its vision and mission, and share its expertise in effective philanthropy. Philantra intends to continue seizing these opportunities and leading the way so that people who want to help can move from intention to tangible action.

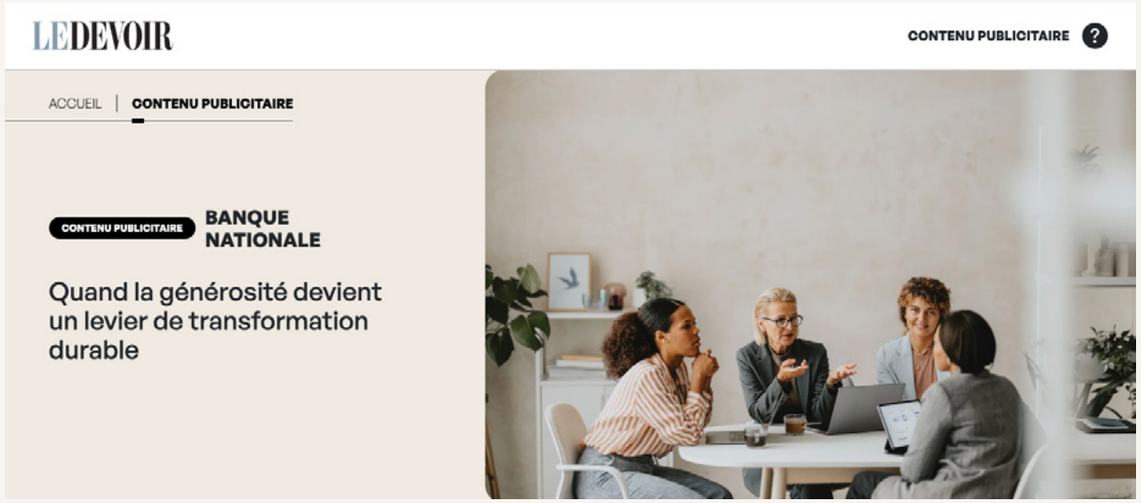
Media Coverage

When generosity becomes a driver of lasting transformation, article in Le Devoir

November 2025

National Bank sponsored content on financial planning and human commitment in support of causes.

See the article

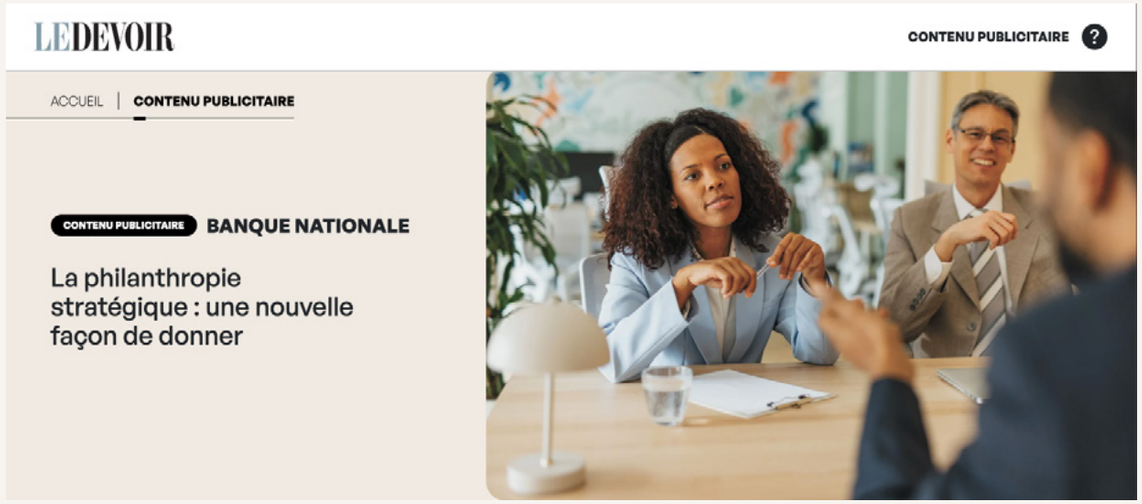


Strategic philanthropy: a new way to give, article in Le Devoir

May 2026

National Bank sponsored content on long-term philanthropic engagement.

See the article



Conferences, Visits and Meetings

Philanthropic training in planned giving

March 2026

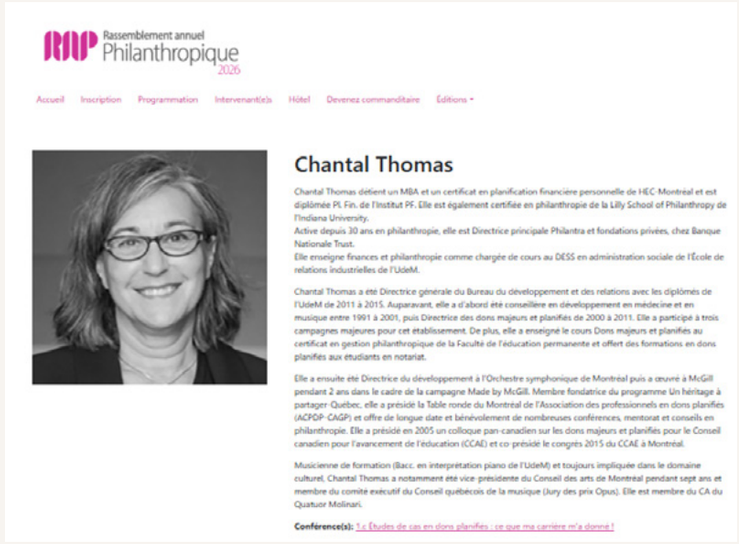
Chantal Thomas delivered part of a training session in Lanaudière on the tax advantages of planned gifts.



2026 Annual Philanthropic Gathering, conference

April 30, 2026

Chantal Thomas delivered a presentation titled “Case Studies in Planned Giving: What My Career Has Given Me!” to participants at the 2026 Annual Philanthropic Gathering in Boucherville.



Visits to organizations in Western Canada

May 2026

The team travelled to Western Canada, in Saskatchewan and Alberta, to strengthen relationships with current clients and local collaborators. They also visited organizations that play an important role in the local community, to better understand the scope of their missions.



Shock and Trauma Air Rescue Services (STARS)



The Alex Community Health Centre

Publications and Mentions by Organizations

Opening of the downtown Montreal mental health living unit, Fondation Santé Urbaine publication

August 2025

Philantra attended the opening of this specialized unit, which was supported in part by the Fondation Leclerc-Racine, administered through Philantra.

See the article



Inauguration de l'unité de vie en santé mentale au centre-ville de Montréal

25 août 2025 · À la une, Dons

Le 25 août dernier, nous avons eu le plaisir d'accueillir Rémi Racine, président et chef de la direction Behaviour Interactif, ainsi que deux membres de son équipe, dans l'unité de vie en santé mentale située aux étages supérieurs du Centre d'hébergement du Manoir-de-l'Âge-d'Or, dans le quartier Jeanne-Mance.

Depuis 2023, ce milieu de vie accueille une clientèle adulte de 18 à 100 ans qui n'a pas besoin d'une hospitalisation en unité psychiatrique, mais qui ne dispose pas non plus de l'autonomie nécessaire pour vivre seule. Ici, chaque personne peut se sentir chez soi tout en bénéficiant de soins spécialisés (psychiatrie, médecine, soins infirmiers, travail social) et d'un programme d'activités favorisant une réintégration progressive dans la communauté.

Au départ, l'unité était aménagée sur un seul étage. Depuis février 2025, ce sont deux étages qui accueillent 30 résidents et résidentes, dans des espaces réaménagés afin de mieux répondre aux besoins de la population. Ce nouvel environnement vise à offrir à la clientèle et aux équipes un milieu chaleureux et sécurisant.

Si les travaux d'infrastructure ont été pris en charge par le gouvernement, c'est grâce à la générosité de Behaviour Interactif et de la Fondation Leclerc-Racine que la Fondation Santé Urbaine a pu financer l'ameublement, l'équipement spécialisé ainsi que du matériel pour les activités sportives, artistiques et

De gauche à droite : Kevan Gauthier, Gestionnaire, relations publiques (Behaviour Interactif); Anastasia Untemer, Directrice des communications (Behaviour Interactif); Vicky Kazaka, Directrice des programmes santé mentale et dépendance (CIUSSS du Centre-Sud-de-l'Île-

Social media mention by the Cancer Research Society

December 2025

Post about a program supporting researchers whose projects help improve the prevention, detection and treatment of all types of cancer.

See the article



Cancer Research Society
5,032 followers
7mo •

+ Follow

Félicitations aux 100 récipiendaires de nos subventions de fonctionnement 2025 ! Ce programme appuie des chercheurs dont les projets contribuent à mieux prévenir, détecter et traiter tous les types de cancer.

⚠ En soutenant ces projets novateurs, la Société de recherche sur le cancer démontre son engagement à faire avancer la recherche en cancérologie.

Pour en savoir plus : https://loom.ly/LKGjAjY

Merci à nos partenaires, CIHR Institute of Cancer Research, Ovarian Cancer Canada, Brain Canada , Myeloma Canada | Myélome Canada, La Vie En Rose, RBC, iA Financial Group (Industrial Alliance), Fondation Philantra, Association des Pompiers de Montreal Inc., et WindsorEssex Community Foundation.

#Recherche #Cancer #SubventionsDeFonctionnement

Show translation

SUBVENTIONS DE FONCTIONNEMENT

ACCÉLÉRER LA RECHERCHE SUR LE CANCER À TRAVERS LE CANADA

Société de recherche sur le cancer

ACCÉLÉRER LES DÉCOUVERTES, ACCÉLÉRER L'IMPACT.

Philantra's Unique Role





Our Partners and Allies

One of the key factors in Philantra's success is unquestionably its strong network of partners.

Heartfelt thanks to these loyal partners on the journey.

> "Serving on the Social Mission Charitable Fund™ committee allows me to look beyond the amounts distributed. It is a rare opportunity to see how targeted support can strengthen the capacity for action of organizations that respond to essential needs, particularly in mental health."
>
> – Julien Alarie
> Senior Director, Client and Employee Engagement
> Commercial and Private Banking 1859

Advisory teams

Clients of National Bank Financial - Wealth Management and Private Banking 1859 maintain their trusted relationship with their advisors and teams for the management of investments held in their philanthropic funds. Philanthropy becomes an added-value service that integrates naturally with the services already offered.

Experts

Financial and estate planners, tax specialists, accountants, legal advisors and other experts, whether internal or the clients' own, work toward the shared goal of serving donor clients and their families well.

National Bank Trust

Oversees Philantra's sound administrative management and strengthens the business model.

Volunteers

Our philanthropic identity is built on the invaluable contributions of volunteers serving on the Board of Directors and on the distribution committee of the Mission sociale Charitable Fund.



The Team’s Four Functions

At Philantra, processes are simple. Communications are direct and focused on the support each situation requires. The approach aims to deliver a satisfying experience for all parties. From philanthropic intention to meaningful support for people and communities.

Watch the video

Listen

Understand the values, intentions and philanthropic aspirations of each donor.

Structure

Develop sustainable philanthropic strategies aligned with donors’ financial goals and personal values.

Support

Provide donors and organizations with practical guidance and tools to foster sound decision-making and amplify their positive impact in the community.

Connect

Deepen relationships among people, causes and areas of expertise to create meaningful philanthropy over the long term.



From left to right: Julie Mulligan, Patricia Letarte, Chantal Thomas, Chantal Fournier and Danika Bouchard.

The Team

The Philantra team welcomed two new team members this year.

Drawing on her experience in community engagement and social impact, Patricia Letarte embodies Philantra's distinctive role as a bridge between donors and organizations, a hallmark of Philantra's approach.

Chantal Fournier strengthens Philantra's administrative structure and supports the team's effectiveness and agility behind the scenes.

Chantal Thomas, Julie Mulligan and Danika Bouchard, Philantra pioneers and pillars, continue to advance their respective visions for Philantra's areas of support.

Looking Ahead



Building the Future Together

The future is built through continued growth and by welcoming an ever-growing community of generous individuals who are driven to make a difference and committed to their communities. Together, their actions heal, bring relief and offer renewed hope across the country and around the world.

The Philantra Foundation is entering a period of consolidation, building on the success of its first six years and the strength of the philanthropic community that surrounds it.

It recognizes that it is through the trust, commitment and determination of this community that it has been able to establish strong foundations and bring its mission to life.

Philantra pays tribute to everyone who helped shape its early years, to its donors and to the many partners who contribute to its reach, as it continues to move forward while remaining true to its mission.

With this momentum, Philantra invites everyone who shares its vision of philanthropy as a force for change to join its community so that, together, we can increase its impact and lasting benefits.

National Bank Trust: A Preferred Partner and Complementary Services

As the achievements presented in this annual report show, philanthropy can generate lasting benefits when it is grounded in tailored support. In addition to the Philantra Foundation offering, National Bank Trust uses its expertise to serve individuals, families, organizations and foundations looking to plan, protect and pass on their wealth, while making their philanthropic ambitions a reality.

Through its role as a provider of administrative and operational services to the Philantra Foundation, National Bank Trust also helps to offer solutions tailored to the needs and values of its clients.

Discover all the trust and philanthropic services available through National Bank Trust.



Philantra
Foundation™



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