

STRENGTHENING OUR COMMITMENT WITH INDIGENOUS COMMUNITIES



As a North American leader in the financial industry, CIBC is committed to supporting First Nations, Métis and Inuit communities achieve wellness and financial prosperity. We are driven by a culture based on common values of trust, teamwork and accountability.

To demonstrate our commitment, we partner with Indigenous clients to support their objectives of economic self-sustainability and self-determination. We do this through building long-term relationships, offering financial expertise, and transferring knowledge to community leaders and members to bolster financial prosperity for all Indigenous Nations and communities.

Understanding the unique needs of Indigenous Nations and communities

To best understand the needs of our clients, our specialized Indigenous Markets Team, more than half of whom are Indigenous themselves, collaborate closely with key expert partners across CIBC to bring the best solutions to our clients.

The Indigenous Markets Team includes dedicated experts in Asset Management, Commercial Banking and Indigenous Trusts. We recognize the value of marrying these skill sets in order to holistically serve the individual needs of Indigenous Nations and communities.

CIBC Asset Management

CIBC Asset Management (CIBC AM) is committed to providing high-quality investment management services to Indigenous communities by proposing customized portfolios to suit our clients' needs through a wide range of investment solutions.

Strengths of our firm at a glance

At CIBC AM, we're dedicated to being the leader in client relationships, and building long-term partnerships with our clients is key to our success.

Experienced investment teams: Our key competitive advantage is the strength of our experienced investment teams. The team is made up of over 85 highly qualified investment professionals with more than 18 years industry experience on average.

Integrated environmental, social, and governance (ESG): We're committed to integrating ESG factors, including Indigenous rights, into our responsible investment policy and process. We actively engage with investee companies on Indigenous issues and reconciliation.

In-house credit research: Our dedicated in-house Credit Research Team is responsible for analyzing the credit quality of every issuer in our clients' portfolios. The team's credit expertise and relative value analysis is utilized across all mandates.

Exceptional client service: Our client servicing team focuses on understanding the needs of our clients and tailoring solutions to help them reach their goals and objectives. Comprised of experienced investment professionals and support staff, the team provides onboarding services, transition management, regular reporting and comprehensive, responsive attention.

Strong risk management culture: Risk management tools are embedded into all parts of the portfolio management process. These tools are leveraged by portfolio managers, credit researchers, compliance, risk management, and performance teams. We seek optimal returns for our clients, but more importantly, returns with risks that are well understood and managed prudently, so that Seventh Generation Principle can be preserved.

CIBC's commitment to Indigenous communities

CIBC is committed to Indigenous prosperity and advancement by:

- Providing nearly \$4.1 million in 2022 to support the next generation of leaders and changemakers from Indigenous communities, including academic bursaries and scholarships.
- Aiming to achieve a Canadian workforce with at least three percent identifying as Indigenous peoples by 2024 (Canada).
- Taking an active role in community-based and national sponsorships, donations and education programs.
- Associating with organizations that recognize, bolster and validate Indigenous excellence and success.
- Creating a culturally relevant, tailored suite of financial literacy programs that can be offered in communities, to help members develop comprehensive financial plans.
- Growing the CIBC Indigenous Employee Circle to provide support and career development resources for First Nations, Métis and Inuit team members.

Firm overview

Founded in 1972¹

- 50 years of experience in managing investment mandates

\$191 billion in assets under management²

- 3rd largest asset manager headquartered in Canada, 9th largest institutional manager by Canadian pension assets³
- \$948 million in Indigenous assets⁴

Investment capabilities across multiple asset classes

- Expertise spans four distinct capabilities — equities, fixed income, multi-asset and currency management
- 85 highly qualified investment professionals with more than 18 years industry experience on average

¹ TAL Global Asset Management Inc., a privately-owned investment manager was founded in 1972. CIBC took an ownership stake in 1994, eventually assuming 100% in 2001.

² As at December 31, 2022. This figure includes \$37 billion in multi-asset and notional currency overlay mandates and \$35 billion in 3rd party sub-advised assets.

³ Benefits Canada – Top 40 Money Manager Report, Spring 2022.

⁴ This figure represents CIBC Institutional Asset Management and CIBC Private Investment Counsel AUM as at December 31, 2022.

Truth and reconciliation

CIBC proudly acknowledges the unique histories, cultures and contributions of Indigenous peoples in Canada. CIBC has formally launched a Reconciliation Action Committee to build a framework with clear and measurable commitments that will accelerate progress while responding to Call to Action #92 of the Truth and Reconciliation Commission of Canada.

Connect with us

It is our privilege to work with you. For more information on CIBC Indigenous Markets Team, please contact us.



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We are capable
of great things
when we stand
together.

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