ATIKAMEKSHENG ANISHNAWBEK

Dear Debendaagzid,

We are pleased to provide you with additional information on the progress we have made regarding the **Atikameksheng Legacy Trust**.

Please see the attached :

- The BENEFICIARY INFORMATION PACKAGE – Version 03.
- The Community Session #4 and #4B Powerpoint Presentation.
- An invitation to our upcoming June 23rd engagement session.
- A QR Code to complete the Atikameksheng Legacy Trust Development Survey

As you know, the Trust Development Working Group (TDWG) has worked diligently for the last 3 years with the goal to structure a trust that reflects our community values and prepares us for long-term success—today and for the next seven generations.

We have learned valuable lessons from managing our first Atikameksheng Trust, and the TDWG has made meaningful progress by listening to and incorporating feedback from the Debendaagziwaad. To date, the TDWG has led several engagement sessions, and our next session will take place on June 23rd.

The information we share with you today is meant to ensure that we progress with a full understanding of all the implications of establishing and managing our trust fund.

Do not hesitate to contact us if you have any questions, at tdwg@wlfn.com and please do join us on June 23rd for our next engagement session.

June 23, 2025 - 5 pm - Dinner
6 pm - Presentation
Holiday Inn - 1696 Regent St, Greater Sudbury

Miigwetch

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BENEFICIARY INFORMATION PACKAGE – Version 03

ATIKAMEKSHENG ANISHNAWBEK
LEGACY TRUST DEVELOPMENT

PREPARED BY: TRUST DEVELOPMENT WORKING GROUP & FREELANDT CALDWELL REILLY

JUNE 2025

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Trust Development Working Group Information Package and Updates

We're excited to share the third version of the Beneficiary Information Package with you. This marks an important milestone in our journey. The first two versions were officially released as:

- Version 01 – July 2023
- Version 02 – April 2025

Since the last release, the Trust Development Working Group (TDWG) has made significant progress. This new package outlines key updates and developments that have taken place.

Where to Find Previous Versions

You can access both Version 01 and Version 02 in the Membership Portal under:

Robinson Huron Treaty Annuities Claim → Archived Documents and Presentations → Trust Development Working Group Package

- Version 01 was posted on July 19, 2023
- Version 02 followed in April 2025

What Was Included in Version 01

- Community Presentation Slide Deck - Presentations held in Atikameksheng (May 25, 2023), Toronto (July 13, 2023), and Sudbury (July 19, 2023), introducing the trust development process.
- Trust Infographic - A visual summary of the trust structure and its potential purposes.
- Survey #1 - A tool to gather input from Debendaagziwaad on their priorities for the trust.
- July 2023 Newsletter- Updates on the early work of the TDWG.
- Meet the Team - A list of experts and community members involved as of July 2023.
- Frequently Asked Questions (FAQs) - Answers to common questions raised during the first round of community presentations.

What Was Included in Version 02

- TDWG Purpose & Composition – February 2025
- Summary of Community Engagements – August 2023 to September 2024
- Past to Present – A look at the journey so far
- Reigniting the Path Forward – TDWG's renewed engagement and future plans
- Roadmap for the Future
- Updated FAQs

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Beneficiary Information Package – Version 03 Summary

As we approach the final stages of trust deed development, the Trust Development Working Group (TDWG) is proud to present this third version of the Beneficiary Information Package. With the referendum scheduled for August 2025, we are entering a pivotal moment—closing the chapter on development and preparing to launch the operational phase of the Atikameksheng Legacy Trust.

While a few key announcements and deliverables remain, the TDWG continues to prioritize transparency, accountability, and meaningful engagement with the Debendaagziwaad. Your feedback has been instrumental in shaping the trust, and we remain committed to ensuring your voices guide us through to finalization.

As the trust nears ratification, the responsibility will soon transition to the six appointed Trustees selected from the Debendaagziwaad. These individuals will carry forward the work of the TDWG, supported by the community input gathered over the past two years. Engagement will continue through the trustees, ensuring that the Debendaagziwaad remain informed and involved as the trust becomes operational.

This moment marks more than just a transition—it is the beginning of a new era. The activation of trust capital and income will soon begin, and with it the opportunity to invest in the priorities of the Debendaagziwaad. We look forward to announcing the Legacy Trustees and investment manager(s) who will help bring this vision to life.

While the trust has always been guided by the principle of serving the next seven generations, it is equally important to affirm that it is designed to support the Debendaagziwaad of today. This legacy document is a reflection of our shared values, traditions, and aspirations. It will stand as a testament to this generation's commitment to building a strong, sustainable future.

We encourage all Debendaagziwaad to stay engaged as we move toward the referendum. Your continued input is helping shape a trust that not only honours our past but also empowers our present.

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What's included in Version 03

Below are the materials included in the Beneficiary Information Package – Version 03:

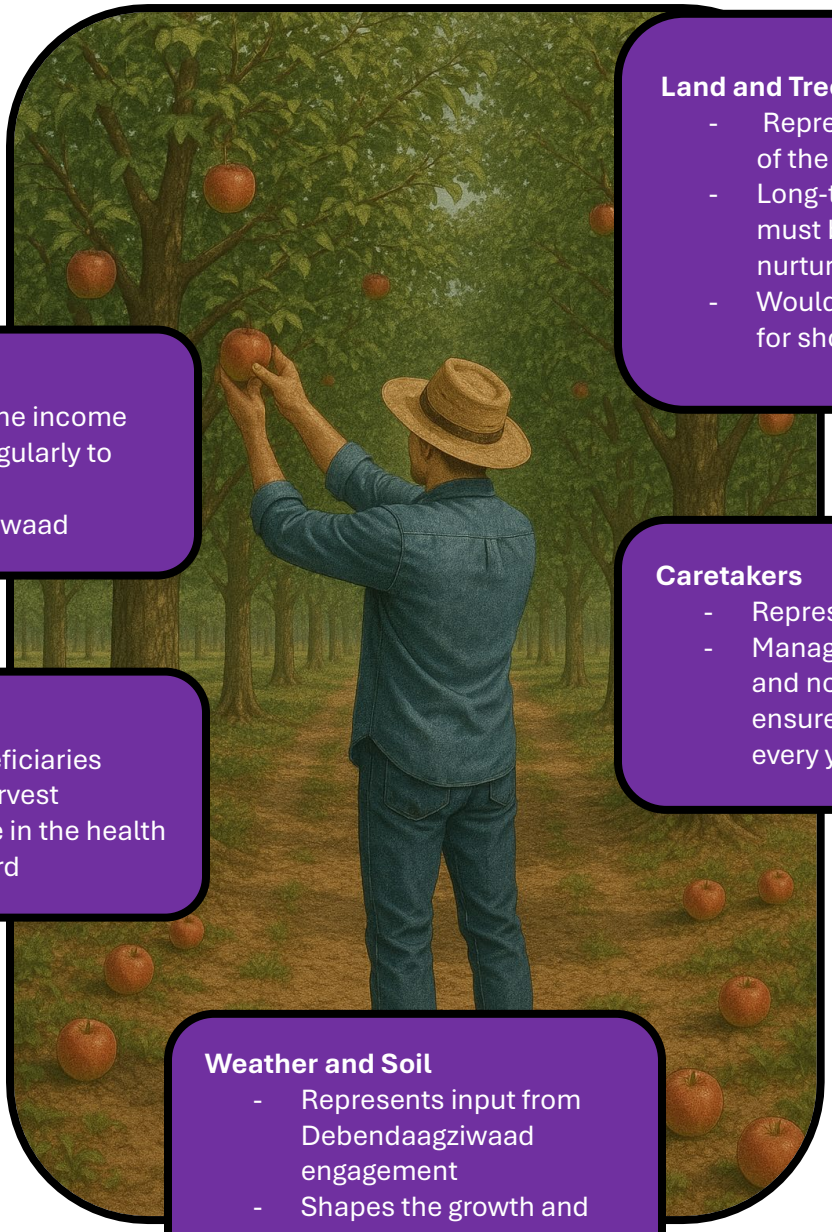
1. Atikameksheng Legacy Trust
2. From Dialogue to Development: Engagement Recap– May 25, 2023 to June 2025
3. Past to Present
4. TDWG Focus Circles: Strengthening the Path Forward
5. Advancing the Vision: TDWG Update & Referendum Readiness
6. Advancing the Vision
7. Frequently Asked Questions

As we move forward, it is important to reflect on past engagements and review previous materials. Debendaagziwaad feedback is essential to this process, and we encourage continued input. If you have any questions or comments, please feel free to contact the team at TDWG@wlfn.com

Atikameksheng Legacy Trust

Creating a community trust can often be a confusing and complex process that often leads to many questions from members. Why use a trust? What is a trust? How do I know the money will be protected and how will I be able to find out?

The creation of a trust and the rules around it can sometimes feel like a foreign concept. But, it gets easier to understand when you liken a community trust to a well-tended apple orchard planted for the benefit of the Atikameksheng Anishnawbek.



Land and Trees
- Represents the capital of the trust
- Long-term assets that must be preserved and nurtured
- Wouldn't cut down trees for short-term gain

Apples
- Represents the income
- Harvested regularly to support the Debendaagziwaad

Caretakers
- Represents the trustees
- Manage the trust, prune and nourish the trees to ensure they produce every year

Debendagziwaad
- Are the beneficiaries
- Enjoy the harvest
- Have a stake in the health of the orchard

Weather and Soil
- Represents input from Debendaagziwaad engagement
- Shapes the growth and adapts over time

The creation of the legacy trust opens limitless opportunities while also protecting the assets, engaging the Debendaagziwaad and ensuring they see direct benefits now and in the future.

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From Dialogue to Development: Engagement Recap– May 25, 2023 to June 2025

As the Trust Development Working Group (TDWG) continues its work with the Debendaagziwaad, we are approaching a major milestone: preparing for a formal referendum on the trust deed. This summary captures the journey of community engagement from May 25, 2023, to June 2025, highlighting the voices, insights, and priorities that have shaped the trust development process.

Over the past two years, the TDWG has made meaningful progress by listening to and incorporating feedback from the Debendaagziwaad. These contributions have been central to shaping a trust that reflects community values and prepares us for long-term success—today and for the next seven generations.

To date, the TDWG has led three full engagement sessions and a partial fourth, all directly focused on trust development. Other community engagement sessions have also included TDWG-related discussions. Alongside this, community engagement around the Robinson Huron Treaty Litigation Funds (RHTLF) and Per Capita Distribution (PCD) have provided valuable insight, even though the TDWG was not a decision maker when it came to those issues. The group has remained informed and responsive to developments directed by leadership.

The TDWG meets monthly to guide the development and implementation of trust-related initiatives. While progress has occasionally paused due to RHTLF and PCD matters, the group has remained committed to its mandate. Throughout the process the TDWG has participated in learning sessions, explored various trust models, and emphasized the importance of a custom-built trust deed.

This summary is more than a record—it's a reflection of the community's voice and a testament to the collaborative effort behind building a trust that will serve the Debendaagziwaad now and in the future.

We encourage the Debendaagziwaad to visit the membership portal to access detailed reports and information related to the sessions outlined below.

You can find these materials under:

- **Robinson Huron Treaty Annuities Claim – Past Compensation Report for Members**
- **Robinson Huron Treaty Annuities Claim – Archived Documents and Presentations**

Community Engagement Session #1 – This session kicked off our community engagement, introducing the TDWG and subject matter experts: Nicole Woodward, Partner at Miller Thomson LLP, Tony McGregor, Partner, CPA, CA at Freelandt Caldwell Reilly LLP, and Rachel Bayley, Executive Trust Officer at TD Wealth Private Trust. The session featured a brief presentation that covered introductions to the team, their roles and responsibilities, and the trust development process. In addition, Community Survey #1 was distributed to gather the community's initial thoughts on the possibilities surrounding the creation of a new trust.

May 25, 2023	Atikameksheng Anishnawbek	Community Centre
July 13, 2023	Toronto, Ontario	Chelsea Hotel
July 19, 2023	Sudbury, Ontario	Holiday Inn

Community Engagement Session #2 – This round of sessions began with a recap of the results from Survey #1. We then focused on the basics of trust formation, outlining the fundamental requirements for a First Nation trust deed and the various customization options available for its structure. The goal was to ensure everyone understood the development process and the wide range of options for drafting the trust deed. Survey #2 was then issued to the community to gather further feedback based on the information shared in this session.

August 22, 2023	Atikameksheng Anishnawbek	Community Centre
August 23, 2023	Sudbury, Ontario	Holiday Inn
August 27, 2023	Toronto, Ontario	Chelsea Hotel

Community Engagement Session #3 – This session included two key presentations: one focused on the Mission & Vision of the trust and the other on Per Capita Distribution (presented on behalf of Gimaa and Council). The Mission & Vision presentation aimed to get the community thinking about the potential of the trust and how it aligns with the values and goals of the community. Although no decisions were made regarding Per Capita Distribution, this session served as an informational opportunity, with questions integrated into Survey #3 along with the mission and vision questions for additional community input.

November 14, 2023	Toronto, Ontario	Chelsea Hotel
November 21, 2023	Atikameksheng Anishnawbek	Community Centre
November 28, 2023	Sudbury, Ontario	Holiday Inn

Reintroducing the TDWG and PCD Eligibility Referendum – During the sessions listed below, community presentations opened with an update on the Trust Development Working Group (TDWG) alongside the referendum materials. On September 12, 2024, the TDWG and newly elected Gimaa and Council reviewed progress to ensure the new Council understood the TDWG roles and responsibilities. Discussions covered the pause in trust development from February to September 2024, the distinction between the TDWG's work and Gimaa and Council's decision-making on the Robinson Huron Treaty Annuities Claim, Settlement Agreement for Past Compensation, and Per Capita Distribution. An update was also provided on trust development progress and next steps, along with a call-out for two TDWG members.

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September 17, 2024	Toronto, Ontario	Chelsea Hotel
September 19, 2024	Sudbury, Ontario	Radisson Hotel
September 20, 2024	Atikameksheng Anishnawbek	Community Centre

Trustee Information Session – was held for Debendaagziwaad members interested in becoming Legacy Trustees for the new trust. The session, titled "The Role and Responsibilities of Being a Trustee," was presented by Nicole Woodward (Miller Thomson LLP), Tony McGregor (Freelandt Caldwell Reilly LLP), and Rachel Bayley (TD Wealth Private Trust). It covered a wide range of topics including the definition and responsibilities of a trustee, fiduciary duties, asset and risk management, legal compliance, trustee liability, communication, working with professionals, succession planning, and best practices. The session also explored what makes a strong trustee candidate and how to assess potential candidates, offering key takeaways to support informed participation in the trust's future

May 1, 2025	Holiday Inn, Sudbury	In-person
May 7, 2025	Zoom	Virtual

Community Engagement #4 - was split into two sessions to allow more time for meaningful dialogue and feedback on the draft Trust Deed. This is a key opportunity for Debendaagziwaad members to help shape the final version of the trust. Members are encouraged to participate in discussions and complete the accompanying survey—those who do will be entered for a chance to win one of three $1,000 prizes. All feedback will guide final revisions and support the work of the first appointed community trustees.

June 4, 2025	Atikameksheng Anishnawbek (Community Complex)	Concurrent - In-person
June 4, 2025	Toronto (Chelsea Hotel)	Concurrent - In-person
June 4, 2025	Ottawa (Lord Elgin Hotel)	Concurrent – In-person
June 24, 2025	**Atikameksheng Anishnawbek (Community Complex)**	**Virtual/In-person**

The TDWG has completed three full rounds of community engagement, with a fourth currently in progress. While many additional sessions have taken place outside of the TDWG's direct work, all community feedback—whether from TDWG-led sessions or broader consultations—has played a vital role in shaping the trust. This ongoing, inclusive process ensures the trust reflects the values, goals, and vision of Atikameksheng Anishnawbek, and highlights the importance of community involvement at every stage of development.

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Past to Present

Community Engagement #1

- TDWG Mandate, Roles & Responsibilities
- Experts introduction
- Background
- Timeline
- Survey #1

May 2023

Community Engagement #2

- Learning about trusts
- Purpose of development
- Key trust features
- Financial & Structural Considerations
- Survey #2

August 2023

Community Engagement #3

- Mission and Vision Statements
- Gathering input from Debendaagziwaad on Mission and Vision statements

November 2023

Community Engagement #4

- Review of draft trust deed (presentation)
- Debendaagziwaad survey
- Sub-committee's updates
- Timeline – going forward

June 2025

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TDWG Focus Circles: Strengthening the Path Forward

During the Trust Development Working Group (TDWG) meeting held on March 29, 2025, it was decided that subcommittees would be formed from within the TDWG to focus on specific, high-priority tasks. These subcommittees—made up of existing TDWG members—were created to streamline work in three key areas:

- **Trustee Selection Committee**
- **Investment Advisor Selection Committee**
- **Purposes Committee**

With support from our advisory team, each subcommittee has begun its work, while the TDWG continues to hold regular monthly meetings. These subcommittees play a critical role, as much of their work must be completed before the finalization of the trust and the components of the Trust Deed, which will be voted on by the Debendaagziwaad during the referendum scheduled for August.

As a reminder, the composition of the TDWG was outlined in Beneficiary Package Version 02, released in April 2025. Below is the current list of TDWG members as of June 11, 2025. All members are required to follow Atikameksheng Anishnawbek's policies on confidentiality, conflict of interest, and the group's Terms of Reference.

Position	Name
Gimaa	Craig Nootchtai
Councilor	Monica Homer
Existing Atikameksheng Trust Trustee	Kelly Huston
Existing Atikameksheng Trust Trustee	Cheryl Nebenionquit
Chief Executive Office	Lorraine Naponse
Chief Administrative Officer	Dennis Cropper
Director of Finance	Teresa Migwans
Debendagziwaad	Ethan Soucy
Debendagziwaad	Jessica White
Debendagziwaad	Vivian Naponse
Debendagziwaad	Christine Smith

Developing a community trust requires diverse perspectives to ensure it reflects the needs and priorities of Atikameksheng Anishnawbek. The Trust Development Working Group (TDWG) includes members from governance, administration, current trust leadership, and both on- and off-reserve community members.

This diverse composition helps ensure a balanced and informed approach, considering key factors such as future settlements, financial sustainability, community priorities, and lessons learned from existing structures. By incorporating a wide range of insights, the TDWG is working to build a trust that reflects the community's vision, supports long-term prosperity, and remains adaptable to future opportunities and challenges.

Debendaagziwaad Update – Trustee Selection Subcommittee

The objective of the selection committee is to provide an opportunity for the Debendaagziwaad to apply for the role of legacy trustee for the new trust.

Key Dates:

- May 9, 2025: Call for interest issued
- May 23, 2025: Application deadline
- May 21, 2025: On-boarding meeting
- June 4, 2025: Discussion on key findings
- End of second week of June: Interviews with candidates
- End of June: Analysis of interviews
- Early July: Final recommendation to Gimaa and Council
- Mid to Late July: Official announcement to Debendaagziwaad of legacy trustees

Background of the role of legacy trustee

The first appointed trustees will be tasked with getting the trust operational once it has been ratified by the Debendaagziwaad. This will be a large undertaking and important to create a strong foundation of policies and operations that will carry over into the terms for the subsequent elected legacy trustees. As of now, the trust is determined to have 3 on-reserve trustees and 3 off-reserve trustees to serve staggered terms with elections proceeding as early as two years from now.

The Purpose of the Sub-Committee

The sub-committee's goal is to develop a fair and transparent selection process that reflects the best interests of the Debendaagziwaad. This includes reviewing and scoring applications submitted by the May 23, 2025, deadline, conducting equitable interviews, and assessing candidates based on individual strengths and group dynamics. The sub-committee will recommend three on-reserve and three off-reserve trustees to Gimaa and Council for final approval. This critical step ensures the trust is led by individuals who embody the community's values and vision. With diverse backgrounds and skillsets, each applicant brings unique strengths that contribute to building a strong foundation for the trust.

Selection Committee – Community Members TDWG

Below are the community members from the TDWG who will take part in the selection committee and make recommendations to Gimaa and Council. They will score applicants based on resumes, letters of interest, and interviews. While a numbered matrix will guide scoring, consensus-building will be key to ensure alignment. The team brings a range of valuable perspectives. The members are:

Vivan Naponse On-Reserve - TDWG	**Dennis Cropper** Chief Administrative Office – TDWG	**Cheryl Nebenionquit** Atikameksheng Trust Trustee - TDWG
Jessica White Off-Reserve - TDWG	**Monica Homer** Councilor - TDWG	**Kelly Huston** Atikameksheng Trust Trustee - TDWG

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Debendaagziwaad Update – Investment Advisor Selection Committee

The Investment Advisor Selection Committee, formed from members of the TDWG, is leading the process to recommend investment manager(s) for the Atikameksheng Anishnawbek Legacy Trust. This is a critical step in ensuring the trust's long-term financial sustainability and alignment with the values of the Debendaagziwaad.

Purpose of the Committee

The committee is responsible for:

- Reviewing proposals submitted through the Request for Proposals (RFP) process.
- Evaluating firms based on Indigenous sector experience, investment strategy, fees, and alignment with community values.
- Conducting interviews with shortlisted firms.
- Recommending one or more investment managers to Gimaa and Council for final approval.

Key Milestones

- RFP Issued: April 7, 2025
- Proposal Deadline: May 2, 2025
- Review & Shortlisting: May–June 2025
- Interviews: Late June 2025
- Final Recommendation & Appointment: July 2025

Committee Members

Ethan Soucy On-Reserve - TDWG	**Dennis Cropper** Chief Administrative Office – TDWG	**Christine Smith** Off-Reserve - TDWG
Teresa Migwans Director of Finance - TDWG	**Monica Homer** Councilor - TDWG	

*Tony McGregor, CPA, CA (Freelandt Caldwell Reilly LLP) is supporting the process by managing the RFP, summarizing proposals, and facilitating meetings and interviews.

Update

The Investment Advisor Selection Committee received 10 out of 11 RFP responses from firms with strong experience in the Indigenous sector. These firms specialize in institutional investing, which involves managing large-scale assets with a focus on long-term growth, risk management, and alignment with community values. All respondents demonstrated a clear willingness to work closely with the Debendaagziwaad and showed a strong understanding of the trust's goals. Their proposals reflect both professionalism and a commitment to supporting the financial well-being of the beneficiaries.

Next Steps

The committee will complete interviews with shortlisted firms and finalize its recommendation to Gimaa and Council. The selected investment manager(s) will work closely with the trustees and The Canada Trust Company to implement the Investment Policy Statement and manage the trust's assets in alignment with community goals.

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Debendaagziwaad Update – Purposes Committee

The Purposes Committee, formed under the Trust Development Working Group (TDWG), has met once formally and continues to make steady progress behind the scenes. This committee plays a vital role in shaping how the trust will serve the Debendaagziwaad—both immediately and for generations to come.

Why This Committee Matters

The committee's work is focused on forecasting and planning how trust income will be used to benefit the community. With significant funds to be contributed to the trust, the committee is working closely with actuaries to estimate models for short-term and long-term financial scenarios. These forecasts will help ensure that the trust is ready to support community needs as soon as it becomes operational.

This is about game-planning for the early stages of the trust—ensuring that once ratified, the trust can begin delivering benefits without delay. The committee's work will be passed on to the first appointed community trustees, providing them with a strong foundation and clear direction.

Grounded in Community Feedback

The committee is drawing on a wide range of community input, including:

- TDWG community engagement sessions
- The Atikameksheng Anishnawbek Comprehensive Community Plan
- RHT and Band-led surveys
- Feedback from the TDWG's own surveys

This ensures that the trust's purposes reflect the real priorities and values of the Debendaagziwaad—regardless of where members live.

Looking Ahead

While no specific initiatives have been finalized yet, the committee is identifying key areas of need based on past feedback. These insights will help guide the first trustees in setting priorities and activating funds in a way that is timely, impactful, and community driven.

Importantly, this work will also inform the investment strategy. By understanding the community's short- and long-term needs, the investment advisor(s) can align their approach to ensure funds are available when needed.

The Purposes Committee is committed to ensuring the trust is responsive today and sustainable for tomorrow serving all Debendaagziwaad with fairness, foresight, and care.

Committee Members

Ethan Soucy On-Reserve - TDWG	**Craig Nootchtai** Gimaa – TDWG	**Christine Smith** Off-Reserve - TDWG
Lorraine Naponse Chief Executive Office - TDWG		**Monica Homer** Councilor - TDWG

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Advancing the Vision: TDWG Update & Referendum Readiness

Since the release of Beneficiary Package 02 in April 2025, the Trust Development Working Group (TDWG) has continued to meet monthly, both as a group and with its advisory team. These meetings are essential to advancing the development of the Trust Deed and preparing for the scheduled referendum in August 2025.

The TDWG follows a structured agenda at each meeting, covering key topics such as consultant hiring, settlement discussions, trust fund usage, and other critical decisions. Agendas are shared in advance to ensure alignment and focus among members. A major focus of these meetings has been the review of the term sheet—the foundational document for the Trust Deed—led by Nicole Woodward, Partner at Miller Thomson LLP.

While the draft Trust Deed is nearing completion, there are still a few community deliverables to be shared to keep the Debendaagziwaad informed and engaged. One of the most important recent steps was the survey issued during Community Engagement Session #4 on June 4, 2025, which sought direct feedback from members on key provisions and naming within the Trust Deed.

This document will serve as a legacy agreement, and it is vital that it reflects the voices and values of the Debendaagziwaad—past, present, and future. The TDWG remains committed to ensuring the trust is built with transparency, community input, and a shared vision for long-term benefit.

Selection of Investment Firms (Subcommittee)

A Request for Proposal (RFP) has been issued to a selected list of investment firms with proven expertise and familiarity in the Indigenous sector. The TDWG will be responsible for reviewing the RFP responses, shortlisting the firms, and conducting interviews. They will recommend firms for the appointment to manage the trust assets, with the final decision resting with Gimaa and Council. We are seeking firms that align with the Debendaagziwaad values, as it is essential that the selected firm shares our vision and principles. Having a firm that resonates with our values will ensure a strong and mutually beneficial relationship, fostering trust and collaboration.

Selection of Investment Firms	**RFP, Review, Interview, and Appointment**
Target Recommendation	**June 2025**

Selection of Community Trustees (Subcommittee)

The appointment of the first trustees will be completed before the trust is ratified. The TDWG will recommend the initial trustees to Gimaa and Council, who will make the final decision. Future trustees will be nominated and voted on in a similar way as the current trust. To ensure fair representation, there will be an equal number of 3 on-reserve and 3 off-reserve Trustees. A clear process will be followed, starting with a call for interest, an application deadline, a review stage, interviews, and then recommendations to Gimaa & Council. This process ensures fairness and inclusivity for all candidates. TDWG members involved will sign conflict of interest and confidentiality agreements to maintain the integrity of the process. Trustee information sessions were held for those interested in learning more about the role and how to become a community trustee. Please see the preliminary schedule below:

Trustee Information Session	**May 1, 2025 (In-person)**
Trustee Information Session	**May 7, 2025 (Virtual)**
Call for Interest	**May 9, 2025 (Official Communication)**
Review Stage	**Third week of May 2025**
Interviews	**June 2025**
Recommendation to Gimaa & Council	**Late June 2025**

Community Engagement #4

The June 4, 2025, session of Community Engagement #4 brought forward meaningful dialogue and thoughtful feedback from the Debendaagziwaad. Due to the depth of discussion and the importance of the topics, the session was partially completed and will continue on June 23, 2025. This two-part engagement ensures that all voices are heard and that the community has ample opportunity to shape the final version of the Trust Deed.

This session focuses on reviewing the draft Trust Deed, a foundational document that will guide the trust for generations. Every section of the draft is open for discussion, and community input is essential to ensure it reflects the values, priorities, and hopes of the Debendaagziwaad—past, present, and future.

To support this, a community-wide survey has been issued, giving members the chance to provide feedback on key provisions and naming within the Trust Deed. As an added incentive, all members who complete the survey will be entered into a draw to win one of three $1,000 cash prizes.

The survey results will be compiled into a report for both the TDWG and the Debendaagziwaad, helping to guide the final revisions of the Trust Deed. This feedback will also be passed on to the first appointed community trustees, ensuring they begin their work with a clear understanding of what matters most to the community.

We encourage all members to attend the June 23 session, participate in discussions, and complete the survey. This is a critical step in finalizing a trust that will serve the Debendaagziwaad today—and for the next seven generations.

June 4, 2025	Atikameksheng Anishnawbek (Community Complex)	Concurrent - In-person
June 4, 2025	Toronto (Chelsea Hotel)	Concurrent - In-person
June 4, 2025	Ottawa (Lord Elgin Hotel)	Concurrent – In-person
June 23, 2025	**Atikameksheng Anishnawbek (Location TBD)**	**Virtual/In-person**

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Community Engagement #5

This session will be the last community engagement before the referendum is held to approve the Trust. It also serves as the official information session under our referendum policy, where we will present the final version of the Trust Deed.

We strongly encourage all Debendaagziwaad to attend, ask questions, and learn more about the final version of the Trust Deed. This version includes changes made based on community feedback from Community Engagement Session #4 held on June 4th and June 23rd, 2025.

Along with a detailed presentation, copies of the final Trust Deed will be shared with all attendees.

It's important to remember that this is not the end of community engagement. Once the Trust is officially in place, there will be more opportunities for the Debendaagziwaad to continue conversations about community priorities.

This Trust is created for the Debendaagziwaad, and community input will always be a key part of the journey forward.

Community Engagement #5	**August 20, 2025**

Referendum on the Trust

We are now entering the final stage in developing the Trust. The next important step is the Referendum, where the Debendaagziwaad will be asked to ratify the finalized Trust Deed.

The vote will take place online through OneFeather and in person on August 23, 2025.

From the very beginning, it has been the vision to put this decision in the hands of the Debendaagziwaad. This moment represents the community's voice shaping the future of our Trust.

Once ratified, the focus will shift to launching the Trust and beginning operations. The community trustees who will have been officially announced and trusted investment managers will take on the responsibility of managing and growing the Trust's assets.

This will be the start of an exciting new journey, bringing the Trust to life and beginning to invest in the priorities and ideas of the Debendaagziwaad. The early actions taken by the trustees will lay a strong foundation for the long-term success of the Trust and help guide future trustees chosen by the community.

We are moving toward a powerful moment in our history activating the funds in line with the original spirit and intention of the 1850 treaty, honoring the legacy of Chief Shawenekezhik, and creating lasting impact for today's Debendaagziwaad and the next seven generations.

Referendum	**August 23, 2025**

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ATIKAMEKSHENG ANISHNAWBEK

ROADMAP

Community Engagement #4
(June 4 & 23 , 2025)

Community Engagement #5
(August 20, 2025)

Ratification by Community August 23, 2025

Final Trust (Operational)

Selection of Investment Firm(s)

Selection of Community Trustee(s)

ATIKAMEKSHENG
ANISHNAWBEK

Frequently Asked Questions

What is the difference between the Atikameksheng Trust and the Atikameksheng Legacy Trust?

The Indigenous Trust industry has changed a lot since the original Atikameksheng Trust was created. Over time, it has become clear that a one-size-fits-all approach does not work, and each First Nation needs a trust that fits its own unique needs. The original Atikameksheng Trust was built around a land claim, but today, there are many more opportunities when creating a new trust. The Trust Development Working Group (TDWG) was formed to look at these changes and compare them to the original trust to see what has worked and what hasn't. With more flexibility and the ability to design a trust that truly reflects the needs and values of the Debendaagziwaad, this process will help the community both now and for the next seven generations.

Why did our current trust not grow?

A trust is treated as a taxable entity, meaning that any remaining taxable income at the end of the year must be paid out to the First Nation. This requirement limited the trust's ability to grow consistently over time. While it did experience growth through capital gains, much of those gains were used to increase payments to beneficiaries rather than building the trust's overall value.

A key feature of the new trust will be protection against inflation. Inflation means that over time, the cost of goods and services rises, so the same amount of money buys less than it did in the past. For example, a dollar in the 1990s had more buying power than a dollar today. Without accounting for inflation, the trust's value would shrink in real terms, even if the total dollar amount stays the same. The new trust will allow for income to be set aside to keep up with rising costs. If the trustees, Gimaa, and Council choose, reinvesting additional profits can further grow the trust's capital, ensuring long-term benefits for members and beneficiaries.

What are the purposes of the trust?

The new trust is designed to be flexible, allowing trustees to use their discretion in deciding how investment income is spent each year. The trust will serve multiple purposes, which will be outlined in the trust deed and ratified by the Debendaagziwaad. These purposes will ensure funds are distributed in a way that benefits the community while also adapting to changing needs over time.

Through ongoing community engagement, an initial list of spending purposes has been developed, but it will continue to expand based on feedback from the Debendaagziwaad. Each year, the trustees will review and determine how to allocate funds within the broad purposes outlined in the trust. These may include, but are not limited to:

Language and culture	Infrastructure	Elder care
Health and wellness	Programming and services	Land acquisition
Education	Training	Environment stewardship
Economic development	Capacity building	Social welfare

The broad nature of these categories ensures that the trust can adapt to new ideas and respond to evolving community priorities.

Community engagement will continue to play a key role in shaping how the trust is used. More opportunities for feedback will be available, and all input will be collected and provided to the first trustees to help them hit the ground running when the trust becomes operational.

Who will be responsible for managing the trust?

The responsibility of managing the trust will be shared by the entire community, directly or indirectly. This trust is for the Debendaagziwaad, and every member plays an important role in its success. While the community as a whole will guide the trust, community trustees will have the primary responsibility for its management. They will make decisions based on the terms outlined in the trust deed, using their discretion to best serve the community's needs.

In addition to the community trustees, there will be an administrative trustee, Rachel Bayley from TD Wealth Private Trust, who will ensure the trust is managed according to the trust deed and in full compliance with legal requirements.

Investment management will focus on growing the trust's capital, ensuring it earns income that will be reinvested into the community each year. The purpose of these funds will align with the priorities set out in the trust deed.

The Debendaagziwaad will have the ability to engage in future consultations and provide feedback during community engagement sessions. As the trust evolves, the community will continue to have a say, including the ability prioritize spending purposes and goals. This trust has been designed for the Debendaagziwaad, and ongoing community involvement will remain a vital part of its growth and management.

How will the trustees be selected, and what qualifications will they need?

The first trustees will be appointed by the Trust Development Working Group and recommended to Gimaa & Council. At this stage, the exact structure and composition of the trustee group have not been finalized. However, we are committed to ensuring that community trustees will include representation from both on- and off-reserve members.

Trustee qualifications will follow a standardized process. While not yet finalized, Debendaagziwaad can expect the following basic requirements:

- Must not be involved in an active bankruptcy proceeding (i.e., an undischarged bankrupt).
- Must not have been convicted of an indictable offense.
- Must not have been convicted or accused of a summary offense related to fraud, false pretenses, or theft.
- Must be at least 18 years old.
- Must be a member of Atikameksheng Anishnawbek.
- Must not be a current trustee of the Atikameksheng Trust.

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The first appointed trustees will have the critical responsibility of getting the trust operational and developing key policies that will be referenced in the trust deed. Official details regarding the trust structure, trustee terms, rotation, and eligibility criteria will be communicated to Debendaagziwaad once finalized.

After the initial trustees complete their term, future trustees will be nominated and elected by the community, following a process similar to that of the Atikameksheng Trust.

In addition to trustees, there will be one liaison representative for youth, one for elders, and one for Chief & Council. These representatives will serve as additional resources to support the community trustees by facilitating communication and knowledge-sharing as the trust becomes operational.

Further engagement sessions will be held to provide more details on the liaison representatives, their roles, and how they will fit within the trust structure.

How will beneficiaries/Debendaagziwaad be involved once the trust is operational?

Once the trust is operational, Debendaagziwaad will have ongoing opportunities to stay informed and involved. Access to trust-related materials will be provided, and clear communication will be a key priority in the years ahead.

The exact methods of communication are still being determined, but they will be shaped by feedback from past and future engagement sessions. Regular updates will be shared through both direct and indirect channels to ensure all Debendaagziwaad members stay informed.

We can guarantee that a general meeting will be held annually, where audited financial statements and the trust's operational status will be presented. Additionally, Debendaagziwaad will have voting opportunities on key initiatives, though the details of these voting processes are still being finalized.

During Community Engagement #4, we will provide more details on decision-making thresholds and matters that require community input. In the meantime, feedback from Debendaagziwaad—both from past sessions and ongoing discussions—will help guide the trustees as they focus on delivering meaningful benefits to the community in their first term.

Who will be considered a beneficiary, how will we ensure future generations get access?

Currently, the beneficiaries of the trust are the Debendaagziwaad of Atikameksheng Anishnawbek, as defined under the Indian Act. However, the goal of the trust is to be as inclusive as possible and ensure it reaches all Debendaagziwaad.

The trust deed is designed to be flexible. While it currently follows the Indian Act definition, it also allows for the possibility of defining "member" according to the Atikameksheng Membership Code if self-governance over the membership list is exercised in the future. This adaptability ensures that future generations will continue to have access to the trust.

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Community feedback is essential in shaping this process. Concerns and suggestions raised in previous engagement sessions have been noted, and ongoing discussions will help refine how the trust evolves. Future community engagements will provide further opportunities for Debendaagziwaad to share their thoughts and ask questions.

How is the Debendaagziwaad being involved in the development of the trust?

The Debendaagziwaad has been actively involved in shaping the trust through ongoing community engagement. So far, there have been three engagement sessions, with two more planned—one to discuss the trust deed and another to present the finalized version before it is ratified by the community.

Throughout this process, members have had multiple opportunities to provide input through surveys and discussions. Surveys 1 and 2 gathered feedback on trust priorities, and engagement sessions have allowed for open dialogue on key decisions. There are still important matters in the trust deed that need to be finalized, and community input will play a vital role in shaping those details.

The Trust Development Working Group (TDWG) is made up of individuals with diverse perspectives to ensure well-rounded discussions. The final trust deed will be presented to the community, ensuring that all members have the opportunity to review and approve it before it becomes official.

As the development process continues, open communication, feedback opportunities, and community engagement will remain essential in creating a trust that meets the needs of both current and future generations.

How will off-reserve members benefit from the trust?

Concerns from off-reserve Debendaagziwaad members have been a key consideration throughout the development process. The trust is designed to provide long-term, unrestricted financial support to all Debendaagziwaad members, regardless of where they live. Ensuring that off-reserve members benefit has been a top priority, and we have actively sought input from them to make sure their needs are addressed.

To ensure fair representation, the trustee group will include off-reserve representatives, and the Trust Development Working Group also has members from off-reserve. Additionally, multiple engagement sessions have been held at off-reserve locations to better reach the Debendaagziwaad living outside the reserve and gather their feedback. This will continue throughout the remaining steps of finalizing the trust and its operational phase once ratified.

Currently, band funding is restricted and is intended for on-reserve initiatives that comply with government requirements. However, the trust will operate independently, providing more flexibility and ensuring that off-reserve members can access the same benefits. The trust will allow us to expand opportunities beyond the limitations of government funding, ensuring that all Debendaagziwaad, whether on- or off-reserve, benefit from the trust's support.

With the trust in place, we can leverage resources more effectively, ensuring that off-reserve members are equally supported. This trust will be a key tool in ensuring fair and equitable support for the entire community, allowing for long-term benefits that go beyond the restrictions of band funding.

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Will there be transparency and reporting on how the trust is managed?

Yes, transparency and open communication will be key priorities both during the development phase and once the trust becomes operational. The Debendaagziwaad can be assured that there will be clear and regular reporting on how the trust is managed, including financial updates.

The trust deed will include provisions that require specific transparency measures, such as annual general meetings where audited financial statements and operational updates will be presented to the Debendaagziwaad. An independent audit will be conducted each year to ensure full accountability. These meetings will provide opportunities for members to ask questions and stay informed about the trust's performance and decisions.

Throughout the development process, community members have voiced strong concerns about transparency. We have taken this feedback seriously and will continue to prioritize clear and open communication. The Trust Development Working Group has made it a priority to provide regular updates, and this commitment will continue as we approach the ratification of the trust deed. Information will be shared in the portal and at ongoing engagement sessions, ensuring that all Debendaagziwaad can stay informed.

Once the trust is fully operational, the trustees will be responsible for maintaining this transparency by keeping the community updated on financial results, decision-making processes, and key initiatives. Transparency is not just a commitment—it is a fundamental part of ensuring the trust remains accountable and beneficial for all Debendaagziwaad, now and for future generations.

How will the trust ensure a balance between providing financial support now and long-term sustainability?

Balancing immediate financial support with long-term sustainability is at the core of the trust's design. From the development phase, it has been a priority to ensure that all Debendaagziwaad are familiar with the trust's structure, provisions, and the long-term vision for its impact. While the trust will provide financial support to meet the current needs of the community, it has been carefully designed to protect and grow its capital to ensure that future generations will benefit as well.

Long-term sustainability is crucial, and we are focused on ensuring that the trust serves not only the Debendaagziwaad of today but also the next seven generations. This is a vital principle rooted in Anishinaabe Law, where we are guided by the belief of looking out for the well-being of future generations, just as our ancestors did when they signed the Robinson Huron Treaty in 1850. Carrying forward the legacy of Chief Shawenekezhik, we aim to preserve and protect the resources of the trust to provide benefits for many generations to come.

To accomplish this, the trust will focus on capital reinvestment. This means that a portion of the income earned from investments will be reinvested each year, allowing the trust's capital to grow steadily over time. This growth will ensure that the trust's financial support increases year-over-year, enabling the community to access more resources in the future. By preserving the capital, we can continue to provide financial support to the Debendaagziwaad in line with the purposes outlined in the trust deed, which will be ratified by the community.

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In addition to preserving capital, transparency will play a key role in ensuring the trust's long-term sustainability. Regular updates and ongoing community engagement will ensure that the Debendaagziwaad remain informed and involved in the trust's management. Provisions in the trust deed will be specifically designed to protect the capital and safeguard against any actions that could threaten its long-term viability. This careful planning will ensure that the trust remains a powerful vehicle for supporting the Debendaagziwaad for generations to come.

How do we ensure the trust continues to align with our community's values and long-term vision?

The trust is being carefully designed to reflect the values and principles of the Debendaagziwaad. It's important to recognize that while we have a vision for the trust today, the future may bring changes in community priorities and needs. To address this, the trust is being built with flexibility in mind, allowing it to adapt and evolve over time. This flexibility ensures that the trust will continue to align with the Debendaagziwaad values and long-term vision, even as circumstances change.

As the trust is developed, future opportunities will arise for the community to provide input and feedback, ensuring that it remains in tune with the needs of the Debendaagziwaad. This approach will ensure that the trust remains adaptable and responsive to the community's evolving vision and goals.

Community engagement will be essential as we move forward with the finalization of the trust. The feedback gathered from past and future sessions will be used to refine and shape the trust to ensure it stays aligned with the values of the Debendaagziwaad. Greater details will be shared in the upcoming engagements, and these sessions will continue to provide opportunities for the Debendaagziwaad to have their voices heard and ensure the trust reflects their collective aspirations for the future.

What is the purpose of the Trust Development Working Group (TDWG)?

The Trust Development Working Group (TDWG) is dedicated to creating a community trust that reflects the values, goals, and priorities of the Atikameksheng Debendaagziwaad—now and for future generations. This trust will support all members, on- and off-reserve, and will be ratified by the community to ensure alignment and legitimacy.

TDWG is responsible for drafting the trust deed with strong community input. More than a financial tool, the trust is a long-term vision for sustainability and growth, designed to evolve with the community's needs.

Operating independently from Gimaa and Council, the trust will be overseen by community-appointed trustees. Initiated in early 2023, it will serve as a financial foundation for future settlements and revenue-sharing, including the remaining funds from the Robinson Huron Treaty settlement.

When is the trust referendum happening?

The Referendum will take place on August 23, 2025. Voting will be available both online through OneFeather and in person. More details about advance voting will be shared closer to the date.

From the beginning, the goal has been to ensure the Trust reflects the will of the Debendaagziwaad. This vote gives the community the power to decide how the Trust moves forward.

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How are the first legacy trustees being selected?

The Selection Committee is to recommend the first Legacy Trustees to Gimaa and Council for official appointment. These initial trustees will play a foundational role in establishing the Legacy Trust.

Their appointment reflects the significant time and dedication required to build the trust's framework and develop its operational policies. The commitment expected from these first trustees will be substantial, as they are setting the groundwork for future Legacy Trustees.

Going forward, all subsequent trustees will be selected through the same election process currently used for the Atikameksheng Trust, ensuring consistency and transparency.

How are investment advisors being chosen?

The Selection Committee will be recommending investment advisors for the new trust to Gimaa and Council. A thorough research process was undertaken to identify and invite firms to participate in the RFP process. Priority was given to firms with a strong understanding of the Indigenous sector and proven experience working with First Nation trusts or organizations.

These investment advisors will play a key role—not only in managing the trust's capital—but also in helping to draft the Investment Policy Statement (IPS). They will work closely with the Legacy Trustees and Debendaagziwaad to ensure that investments align with the IPS and reflect the community's long-term vision.

It's essential that the selected advisors share the values and goals of Debendaagziwaad. Their investment strategies must support potential large-scale capital projects and community-driven initiatives. Additionally, they should be capable of engaging with the community through education sessions, consultations, and clear communication of investment outcomes.

What are the purposes of the sub-committees within the TDWG?

The TDWG established subcommittees to allow members to focus more closely on specific areas of trust development that need to be finalized before the upcoming referendum. This structure enables smaller teams to work more efficiently and effectively, given the significant planning, coordination, and decision-making required.

These subcommittees were formally delegated during the TDWG meeting on March 29, 2025. Since then, each of the three subcommittees has made meaningful progress in their respective areas, contributing to the overall momentum as we move toward the scheduled referendum on August 23, 2025.

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How can I access previous documentation regarding the trust development?

Debendaagziwaad are encouraged to stay informed by visiting the Atikameksheng Anishnawbek website, where a secure membership portal is available. This portal serves as a central hub for accessing important updates and information related to the trust development process.

The TDWG has implemented a communication strategy designed to ensure that all members can easily stay connected and informed. This includes regular updates, clear messaging, and accessible channels for engagement.

We recognize that many members have questions about the trust's progress and development. Your curiosity and involvement are deeply appreciated, and we remain committed to maintaining transparency and open communication throughout this journey.

If you need help navigating the portal or have questions, support is available to guide you.

How is the TDWG engaging all generations of the Debendaagziwaad in the trust development process?

The TDWG is committed to ensuring that every generation of the Debendaagziwaad—youth, adults, and Elders—has meaningful opportunities to engage with and contribute to the trust development process. We recognize that inclusive participation is essential to building a trust that reflects the values, needs, and vision of the entire community.

To support this, we are enhancing our communication strategy and exploring alternative methods of engagement that are accessible and relevant to different age groups. Members will be notified as new initiatives and opportunities are scheduled.

We are creating youth-focused spaces that offer educational experiences about the trust, its development, and its long-term purpose. These sessions are designed not only to inform but also to gather direct feedback from youth, whose voices are vital as future beneficiaries—and potentially future Legacy Trustees.

To further support youth involvement, we are introducing a Youth Liaison position. While this role does not carry voting rights, it provides a valuable opportunity for a young person to participate in discussions, gain insight, and build leadership experience that could one day lead to a trustee role.

We deeply value the wisdom and cultural knowledge of our Elders. To ensure their voices are heard, we are also introducing an Elder Liaison position. Like the Youth Liaison, this role is non-voting but plays a key part in trustee discussions by offering guidance, traditional knowledge, and thoughtful perspectives for consideration.

We are also planning dedicated engagement opportunities that are respectful, accessible, and aligned with the preferred ways Elders share and receive information.

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What is happening with the current Atikameksheng Trust?

At this time, there is no formal change planned for the existing Atikameksheng Trust. The Trust Development Working Group (TDWG) is currently focused on finalizing the new Legacy Trust and preparing for the upcoming referendum. While there have been early discussions about the Atikameksheng Trust during TDWG meetings and community engagement sessions, the main priority is ensuring the Legacy Trust is built on a strong foundation that reflects the needs of the Debendaagziwaad today and for future generations.

It's important to understand that the Legacy Trust and the Atikameksheng Trust will be two separate and distinct entities. The Indigenous trust landscape has evolved significantly since the original Atikameksheng Trust was created. What we've learned over time is that a one-size-fits-all approach doesn't work—each First Nation needs a trust that is tailored to its unique goals, values, and vision.

The original Atikameksheng Trust was created in a different era, primarily around a land claim. Since then, the trust industry has grown, and new opportunities have emerged. The TDWG was formed to explore these changes and apply lessons learned to the development of the Legacy Trust. This includes addressing past challenges and designing a trust that is more flexible, sustainable, and aligned with the long-term interests of the community.

One key difference is how the new Legacy Trust will handle growth and inflation. The original trust had to distribute most of its income each year, which limited its ability to grow over time. The Legacy Trust, however, is being designed to allow for reinvestment and protection against inflation—ensuring that the value of the trust keeps pace with rising costs and continues to benefit the community well into the future.

We recognize that there are questions and concerns about how the two trusts will coexist. The TDWG is committed to transparency and education throughout this process. Information sessions and communication efforts will continue to help explain the differences, answer questions, and ensure that all members of the Debendaagziwaad feel informed and included.

As we move forward, both trusts will serve important but different roles. The Atikameksheng Trust will continue to operate as it has, while the Legacy Trust will represent a new chapter—one built with the input, feedback, and vision of the community.

What is happening with the Minor's PCDs?

We understand that there have been many questions about how the Minor's Per Capita Distribution will be handled, and we want to provide reassurance and clarity.

For minors who were eligible to receive the $100,000 Per Capita Distribution, their funds will be placed into a separate Minor's Trust Account. This account is designed specifically to protect and grow their funds until they reach adulthood.

The funds in the Minor's Trust will be managed by professional investment advisors. Their job is to invest the money in a way that is safe, responsible, and protects against inflation, so that the value of the funds grows over time.

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The current Gimaa and Council have already taken steps to ensure this process is secure. Even before the Legacy Trust is officially established, the funds for eligible minors have been earmarked and placed into a separate account to protect their future.

When a minor turns 18 years old, they will receive their $100,000 plus any interest that has built up over the years.

We also want to reassure families that children in care who would have been eligible under the legislation at the time of the eligibility date will also be entitled to receive their PCD when they turn 18. These individuals will be given a grace period to apply for and obtain their status to Atikameksheng Anishnawbek, which is required to receive their funds.

This approach reflects our commitment to education, fairness, and long-term planning. It ensures that all eligible youth are supported and that their future is protected as part of the broader vision of the Legacy Trust.

What is the purpose of having on & off reserve legacy trustees?

The Legacy Trust is being built with the understanding that every member of the Debendaagziwaad matters—no matter where they live. Whether on-reserve or off-reserve, all members share a connection to Atikameksheng Anishnawbek and have a role in shaping its future.

During Engagement Session #4, questions were raised about the roles of on- and off-reserve Legacy Trustees. We want to emphasize that there is no difference in value or importance between members based on where they reside. The decision to include both on- and off-reserve trustees is not about creating division—it's about embracing diversity and ensuring that the full range of experiences and perspectives within our Nation is represented.

By having trustees from both on- and off-reserve, the Legacy Trust Board can better understand and respond to the unique needs and realities of all Debendaagziwaad. This structure encourages balanced dialogue, inclusive planning, and thoughtful decision-making that reflects the whole community.

This approach helps break down long-standing barriers and opens the door to stronger unity and collaboration. It ensures that community initiatives, investments, and opportunities are developed with equity and fairness in mind—so that all members, regardless of location, feel seen, heard, and supported.

The Legacy Trust is a step forward in building a future that honors our shared identity while respecting the different paths our members walk. Together, we are creating a trust that serves everyone—today and for generations to come.

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Community Engagement #4:

Structure and Form of the Draft Trust Deed

PRESENTED BY:

Tony McGregor, CPA, CA, Partner – Freelandt Caldwell Reilly LLP

Nicole Woodward, Partner – Miller Thomson LLP

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ATIKAMEKSHENG ANISHNAWBEK

Agenda

- Trust Development Working Group (TDWG) – Update
- TDWG – Selection Sub-Committees
  - Legacy Trustees
  - Investment Managers
  - Purposes
- Survey
- Trust Deed - *draft*

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Trust Development Working Group (TDWG) – Update

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TDWG – Update

- The TDWG reconvened in February 2025
  - 3 meetings have occurred in 2025
- Legacy trust drafting continues pending feedback
- Community engagement with Debendaagziwaad
  - Community input
  - Drafted and reviewed by Debendaagziwaad
  - Referendum on the Trust Deed



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TDWG – Timeline

Community Engagement #1

- **Session Kickoff**
- **Introductions:** TDWG/experts
- **Roles, responsibilities, & trust development overview**
- **Survey #1**

Community Engagement #2

- **Recap:** Survey #1 results
- **Focus:** Basics of trust, key trust deed requirements
- **Options:** Customization possibilities
- **Survey #2:** Collect feedback on session

Community Engagement #3

- **Key Topics:** Mission & Vision statements of the trust
- **Mission & Vision:** Encourage alignment with community values/goals
- **Survey #3:** Gather feedback on Mission & Visions

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TDWG – Timeline

Community Engagement #4

- **Draft trust deed**
- **Feedback/Input to shape final version**
- **Survey**

Community Engagement #5

- **Final Engagement**
- **Official Info Session**
- **Final Trust Deed**

Ratification by Community

- **Voting on final trust deed**
- **Online via OneFeather**
- **In-person voting**

Final Trust (Operational)

- **Community Initiatives**
- **Purposes**
- **Drafting subsequent policies**

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TDWG – Timeline



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TDWG – Timeline

- **Expected steps moving forward**
  - Continuing monthly meetings
  - Review/incorporate Debendaagziwaad feedback
  - Preparation for engagement sessions #5
    - Announcement of Legacy Trustees/Investment Firms
  - Community Engagement Session #5
    - Review of Atikameksheng Legacy Trust
  - Ratification of the Legacy Trust



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TDWG – Selection Committee Updates

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Legacy Trustees

- Call for Interest Deadline: Closed on May 23, 2025
- Information Session: 2 sessions held for Debendaagziwaad
- June 4, 2025: Selection Committee meets to shortlist candidates
- June 2025: Interviews to take place
- End of June 2025: Final recommendations to Gimaa & Council

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Investment Firm(s)

- RFP response deadline: closed on May 2, 2025
- Total responses received:
  - 10 Investment firms specializing in the indigenous sector
- Early June 2025: Subcommittee meets to review and analyze proposals
- June 2025: Interviews based on shortlisted firms
- End of June 2025: Final recommendation to Gimaa and Council

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Purposes Sub-Committee

- TDWG committee
  - Created to explore the costs associated with feedback on how to spend trust income
  - Preliminary research and information gathering stage
  - Working with an actuary to calculate future costs and needs



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Survey

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ATIKAMEKSHENG ANISHNAWBEK

Survey

- Legacy Trust Survey follows along with slideshow
  - Providing more context to the questions being asked
- Seeking direct feedback from the Debendaagziwaad
  - Specific and general
- Throughout slideshow, green coloured wording will indicate **Survey Questions**
- Three cash prizes of $1,000 – Please fill your name to be entered

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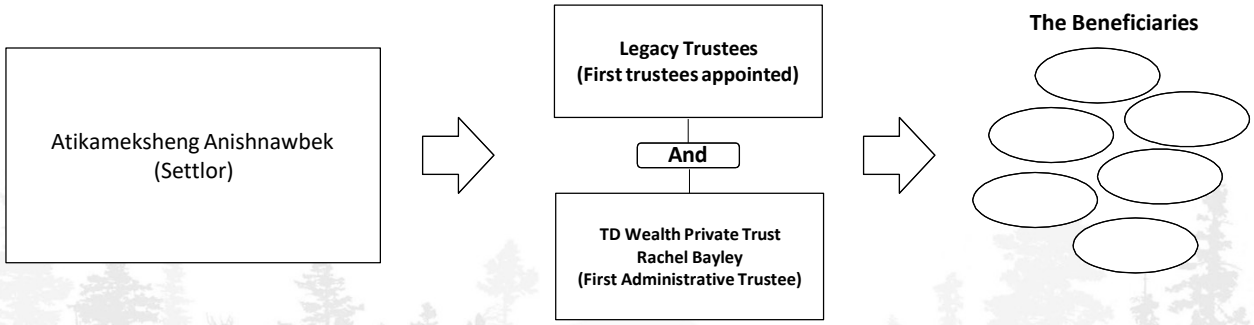
Draft

Atikameksheng Legacy Trust Deed

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ATIKAMEKSHENG ANISHNAWBEK

Understanding the Relationship the Trust Creates

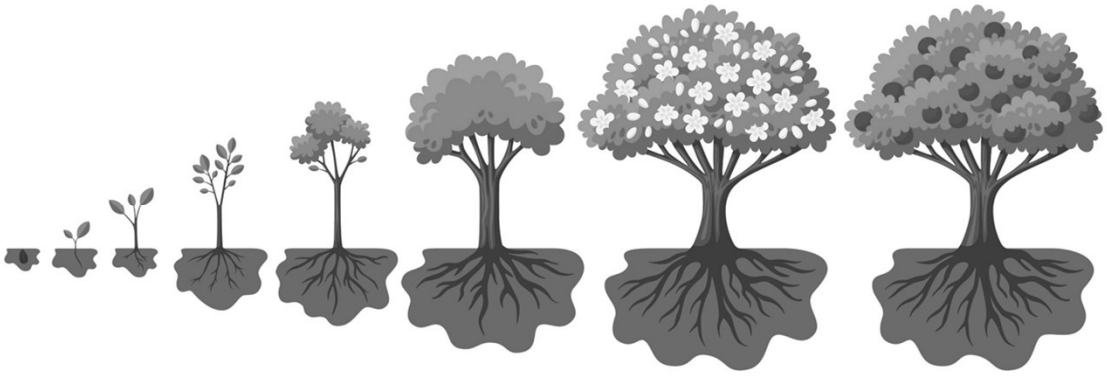


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ATIKAMEKSHENG ANISHNAWBEK

Generational Wealth

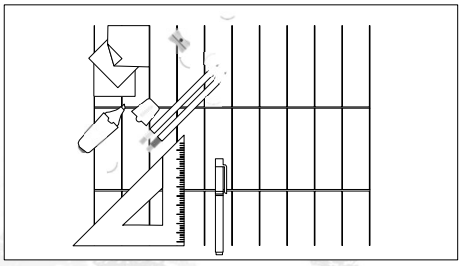


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ATIKAMEKSHENG ANISHNAWBEK

PRE-AMBLE



- Introduces the background/purpose of the trust
- Details on why the trust was settled
- Reasons or Objectives for the trust's existence
- Provides context
  - Thrive together, strong & proud Nation
  - Value the gift of Anishabemowin
  - Value Mino Minadsowin
- Understanding the intent of parties involved

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ATIKAMEKSHENG ANISHNAWBEK

Incorporating the 7 Grandfathers' Teachings

Zaagidiwin (Love)

Minwaadendamowin (Respect)

Aahodewewin (Courage)

Atikameksheng Anishnawbek

Debwewin (Truth)

Nibwaahawin (Wisdom)

Dabasendiziwin (Honesty)

Dibaadendiziwin (Humility)

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ATIKAMEKSHENG ANISHNAWBEK

Difference between the trusts?

Legacy Trust

- Drafted with modern practices
- Flexibility for the future
- Ability to accept additional contributions
- Protects against inflation and promotes growth
- Community driven process
- Considers inter-generational wealth

Atikameksheng Trust

- Created in 1999
- Required as part of the settlement with Canada
- Does not factor in need for inflation protection
- Limited funds = limited spending ability
- First years emphasized paying for PCDs
- On-going eligibility for new PCDs as one-time distribution paid out of income

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Section 1

INTERPRETATIONS

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ATIKAMEKSHENG ANISHNAWBEK

Key Definitions

- **People**
  - Administrative Trustee
  - Beneficiaries
  - Council
  - Council Liaison
  - Elder Liaison
  - Family
  - Guardian
  - Investment Manager
  - Legal Counsel
  - Member/Members

- **Legacy Trustees**
- Minor
- **Off-Reserve Trustee**
- **On- Reserve Trustee**
- **Senior**
- **Youth Liaison**



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ATIKAMEKSHENG ANISHNAWBEK

Survey Questions

Currently trustees are called "Legacy Trustees", select a name you'd wish to call the trustees from Atikameksheng Anishnawbek.

What should on- and off-reserve trustees be called?

Is there an alternative name you would prefer for the Senior Liaison Position?

Is there an alternative name you would prefer for the Youth Liaison Position?

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ATIKAMEKSHENG ANISHNAWBEK

Key Definitions

- **Operational**
  - Accumulation
  - Administrative Trustee
  - Annual Comprehensive Budget
  - Approved Expense
  - Comprehensive Plan (CP)
  - CPI
  - General Meeting
  - Investment Statement Policy (IPS)
  - Notice
- Request
- Trustees' Resolution
- Trust Property
- Uncooperative Trustee



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ATIKAMEKSHENG ANISHNAWBEK

Key Definitions

- **Deferred Per Capita Distributions**
  - Accumulation
  - CPI
  - Deferred Per Capita Distribution
  - Deferred Per Capita Distribution Date
  - Guardian
  - Legal Personal Representative
  - Mentally Incapable
  - Minor
  - Taxable Income



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ATIKAMEKSHENG ANISHNAWBEK

Key Definitions

- **Spending Purposes of the Trust**
  - Comprehensive Plan (CP)
  - Economic Development Guidelines
  - Economic Development Initiatives
  - Natural or Other Disaster
  - Purposes



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Section 2

CREATION OF THE TRUST

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ATIKAMEKSHENG ANISHNAWBEK

Legal Name

Legacy trust

What should your trust be called?

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ATIKAMEKSHENG ANISHNAWBEK

Creation of the Trust

- **Settlement of the trust**
  - Settled upon trust settlement property
- **Acceptance by Trustees**
  - Signed trust deed & duties
- **Trust irrevocable**
  - Shall be irrevocable by the Settlor
- **Termination date**
  - Trustees shall pay/transfer the whole trust property to Atikameksheng Anishnawbek



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Section 3

ADDITIONS TO THE TRUST PROPERTY

30

ATIKAMEKSHENG ANISHNAWBEK

Acceptance of Additional Property

- Acceptance of **future** settlements, claims or monies from the Settlor or other sources
- Legal advice required before acceptance



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Section 4

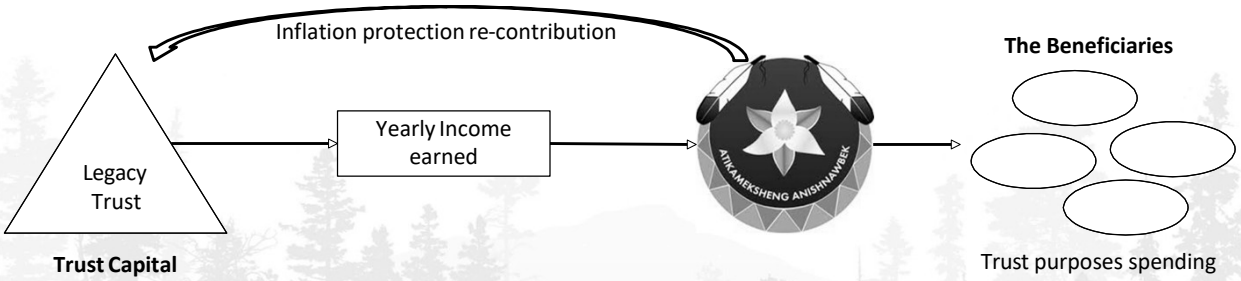
PURPOSES OF THE TRUST

32

ATIKAMEKSHENG ANISHNAWBEK

Purposes of the Trust

- Managed by Trustees
- Trust capital and income distributions governed by Trust Deed & Comprehensive Plan (CP)

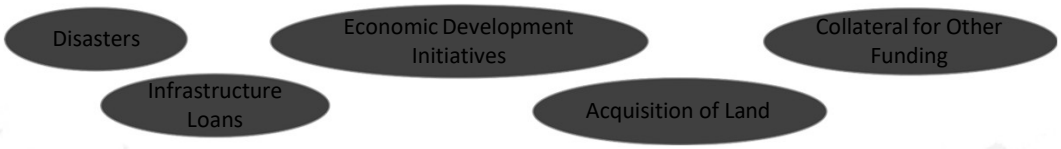


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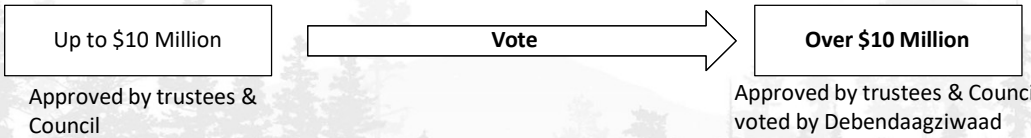
ATIKAMEKSHENG ANISHNAWBEK

Distribution of Trust Capital

- **Capital Definition** – total amount held in trust, separate from annual income
- **Distribution usage**



- **Approved requirements**



Approved by trustees & Council

Approved by trustees & Council & voted by Debendaagziwaad

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ATIKAMEKSHENG ANISHNAWBEK

Loans & Leveraging Limits

- **Cannot** exceed **20%** of the **investable assets** at **end** of the **prior fiscal year**
- Repayment terms will be outlined in the CP
  - Consider commercial terms
  - Strategic reasons why commercial terms would be discounted



ATIKAMEKSHENG ANISHNAWBEK

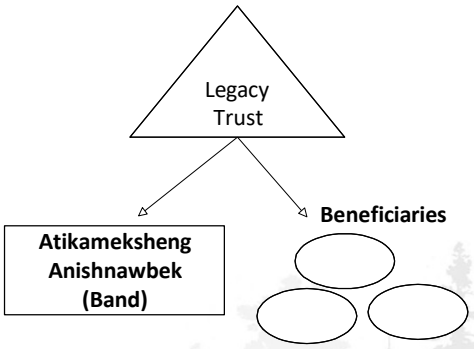
Distributions of Trust Income

- **Annual Distributions**
  - Made yearly in alignment with the Comprehensive Plan
- **Mandatory Distributions**
  - Required over the trust's duration to reduce taxable income within the trust to $0
- **Tax Compliance:**
  - Any undistributed taxable income must be paid to the First Nation
  - Payments to First Nation must be in the form of non-interest bearing note
  - Note must not restrict the holders right to immediate payment
- **Beneficiary Allocation**
  - Trustees may distribute income to any entity that is a beneficiary of the trust under the CP.

ATIKAMEKSHENG ANISHNAWBEK

Distributions of Trust Income

- Use band's existing systems to deliver programming
- Create programming that aligns with trust purposes
- Accountability to the trustees on performance
- Trust funds flow into services people already use
- Streamline delivery – no need to build or duplicate systems



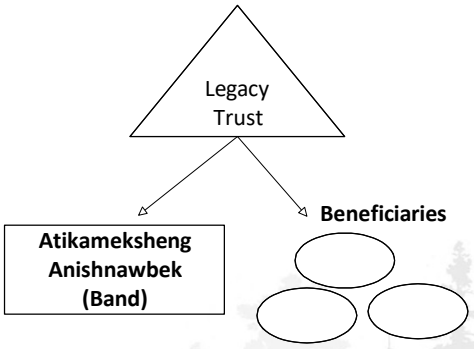
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Distributions of Trust Income

- Reduces costs by using current staff and programs
- Enables larger, strategic initiatives
- Service all Debendaagziwaad, no matter where they live
- Builds unity & fairness
- Efficient Oversight: audits & reporting to the Debendaagziwaad



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ATIKAMEKSHENG ANISHNAWBEK

Initial Use of Trust Property

- Trust will pay Atikameksheng Anishnawbek for professional fees and disbursements made on its behalf for the settlement of the Trust



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ATIKAMEKSHENG ANISHNAWBEK

Discretionary Use of Income – Purposes

Education	**Economic Development Initiatives**	**Social programs**
Infrastructure	**Acquisition of land**	**Health and wellness**
Recreation	**Housing**	**Facilities, Services and support for Seniors**
Public services	**Funding business and employment opportunities**	**Public Safety, and emergency services**
Protection of Treaty & Aboriginal rights	**Culture and language**	**Environmental protection initiatives**
Governance & Capacity building	**Capacity to consult with industry**	**Funding for community infrastructure**
Natural or Other Disaster, pandemic, endemic, epidemic outbreak	**Further Legal Claims**	

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ATIKAMEKSHENG ANISHNAWBEK

What Could Spending Look Like?

Education	Health and Wellness	Housing
Top-up existing programs	Glasses, dental, hearing aids	Supporting and expanding existing programs
Tuition	Ramps, grab bars, lifts	Repairs
Living expenses	Ambulance	Housing units and capital construction
Masters and PHDs	Mobile health clinic	Off-reserve housing
Apprenticeships and Vocation schools	Cultural wellness retreats	Emergency housing

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ATIKAMEKSHENG ANISHNAWBEK

Survey Question

What key areas should the trustees prioritize and concentrate on developing and investing first?
Choose up to 3, empty boxes below to add your own suggestions

What specific ideas do you have for the use of trust income that fall under the trust purposes?

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Section 5

DEFERRED PER CAPITA DISTRIBUTION

43

ATIKAMEKSHENG ANISHNAWBEK

Legacy Trustees & Deferred PCDs

- Trustees will manage the $100,000 PCD for those that have not received their payment
- Transfer of PCD related duties previously held by Gimaa and Council
- Hold and invest funds for **Minors** and **Mentally Incapable Debendaagziwaad**
- Eligibility will remain unchanged as previously announced
- **Deferred PCD**
  - Interest will be earned – Accumulation Request
  - Management of funds and compliance with the distribution eligibility required

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Section 6

PAYMENT OF EXPENSE

45

ATIKAMEKSHENG ANISHNAWBEK

Payment of Expenses

- Ability to pay for expenses related to the operations of the Trust
- Anything approved in the budget (**Subject to the thresholds below**)
- Examples

Professional Fees	Trust administrator	Investment Management Fees

- **Approved Requirements**

Up to $100,000	Up to $999,999	→	Over $1 Million
Approved by trustees	Approved by trustees & Council		Consent of Debendaagziwaad

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Section 7

COMPREHENSIVE PLAN

47

ATIKAMEKSHENG ANISHNAWBEK

Comprehensive Plan (CP)

- **Purpose** – Strategic document outlining community goals and priorities
- **Creation** – Drafted by community trustees in compliance with trust deed
- **Approval –** Presented to members annually, update and approval on 5-year basis
- **Sections Include:**
  - Income Distribution Policy
  - Resource Allocation
  - Capital Preservation Policy
  - Investment Rules
  - Priorities
  - Trustee Election Policy
  - Annual Review

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ATIKAMEKSHENG ANISHNAWBEK

Survey Question

How should Debendaagziwaad help determine the key priorities for how trust income are spent?

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Section 8

DUTIES OF TRUSTEES

50

ATIKAMEKSHENG ANISHNAWBEK

General Duties

- **Trustees must:**
  - Act honestly, in good faith, and exercise a standard of care
  - Carry out the terms of the Trust
  - Act independently
  - Cannot delegate responsibility



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ATIKAMEKSHENG ANISHNAWBEK

Specific Duties

- Invest trust property in accordance with Investment Policy
- Make decisions about the use of income for the trust's purposes
- Approve trust expenses
- Work with the Administrative Trustee
- Prepare and follow a budget
- Keep records and accounts
- Get financial statements audited
- Report trust activity to members at least annually



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Section 9

POWER OF TRUSTEES

53

ATIKAMEKSHENG ANISHNAWBEK

General & Specific Powers

- Trustees can establish a charitable or not-for-profit organization
- Vary the trust because of tax legislation
- Invest under the Investment Policy Statement
- Facilitate the acquisition of land for Atikameksheng Anishnawbek
- Retain professionals
- Contract on behalf of the trust



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Section 10

INVESTMENTS

55

ATIKAMEKSHENG ANISHNAWBEK

Investments

- **Hiring & firing of investment manager(s)**
  - Trustees, Gimaa & Council
- **Remain arm's length**
- **Put agreements in place**
  - Investment manager(s) to abide by Investment Policy Statement



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ATIKAMEKSHENG ANISHNAWBEK

Survey Question

What guiding principles should the trustees rely on when deciding on how to invest the funds to generate income and support the wellbeing of our people and future generations?

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Section 11

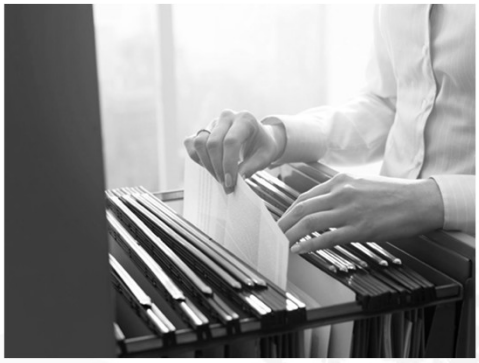
FIRST ADMINISTRATIVE TRUSTEE

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ATIKAMEKSHENG ANISHNAWBEK

First Administrative Trustee

- **TD Wealth Private Trust**
- **Responsibilities**
  - Compensation
  - Term of office
  - Resignation or removal
  - Successor
  - Duties
    - Opening of accounts
    - Custody of assets
    - Record keeping
    - Administering payments



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Section 12

ADMINISTRATIVE TRUSTEE

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ATIKAMEKSHENG ANISHNAWBEK

Administrative Trustee (CONTINUED)

- Must be experienced and a trust company
- Clarification of the role of a successor administrative trustee



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Section 13

REAL PROPERTY VALUATION

62

ATIKAMEKSHENG ANISHNAWBEK

Real Estate Appraiser

- Trustees can hire real estate appraisers
- Insight into value of property
- Valuation is not required for transferring real estate to a trustee for the trust



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Section 14
TRUSTEE PROCEDURES
Section 15
TRUSTEES
Section 16
ELDER LIAISON & YOUTH LIAISON & COUNCIL PERSON LIAISON

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ATIKAMEKSHENG ANISHNAWBEK

Trustee Procedures

- Meetings
- Notice
- Virtual and in-person
- Quorum and Chair
  - (**Corporate Trustee tie-breaking vote**)
- Decisions
- Minutes
- Developing Rules



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ATIKAMEKSHENG ANISHNAWBEK

Trustees



- **Prohibitions**
  - Can not be an undischarged bankrupt
  - Can not be convicted of any indictable offence
  - Can not be convicted of a summary offence involving fraud, false pretenses, theft or property held as a trustee or fiduciary
- **First Trustees**
  - Appointed
- **Subsequent Trustees**
  - Nominated and elected

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ATIKAMEKSHENG ANISHNAWBEK

Survey Question

Should the termination of a Trustee's term of office be based solely on a conviction?

Or should being charged with certain offenses also be grounds for removal?

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ATIKAMEKSHENG ANISHNAWBEK

Trustees

- **Representation**
  - 3 on-reserve members
  - 3 off-reserve members
- **Staggered 4-year terms**
  - 2 term maximum
- **Vacancies**
  - Appointment of replacement
- **Termination of Office**



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ATIKAMEKSHENG ANISHNAWBEK

Liaison Positions

- All eligible member have the opportunity to be a trustee
- In addition
  - Elder & Youth Liaison positions will have a **non-voting** voice at the table
  - Provide input & guidance
  - Appointed by Gimaa & Council in accordance with the process set out in the Comprehensive Plan



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ATIKAMEKSHENG ANISHNAWBEK

Survey Question

How should the Elder Liaison be chosen?

How should the Youth Liaison be chosen?

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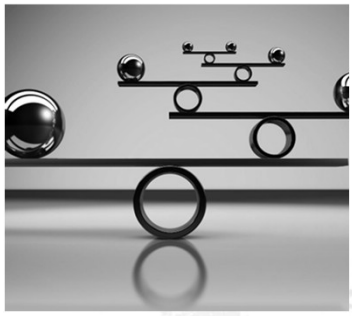
Section 17

TRUSTEES CONFLICT OF INTEREST

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ATIKAMEKSHENG ANISHNAWBEK

Conflict of Interest



- **Disclosure requirements**
  - Perceived vs. actual
  - Non-participation
- **Timing of disclosure**
  - Immediately upon becoming aware
- **Further outset and process set out in the Comprehensive Plan**

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Section 18

LIABILITY AND INDEMNITIES

73

ATIKAMEKSHENG ANISHNAWBEK

Liability & Indemnities

- **Liabilities of co-trustees**
  - No trustee who exercises a standard of care should be liable for the acts of a co-trustee
- **Limitation of Liability**
  - A trustee, observing a standard of care will not be liable for:
    - Losses of investments
    - The activities of others, provided the person was selected with reasonable care and they were supervised
    - Any claim against the trust in the payment to Atikameksheng Anishnawbek
    - An inability to meet the requirements of the Comprehensive plan
- **Litigation**
  - The trust will pay any necessary costs in connection with the cases brought against the trustees in their capacity as trustees or against the trust
  - Trustees would repay if its determined they acted in bad faith or breached a standard of care

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Section 19

TRUSTEE REMUNERATION

75

ATIKAMEKSHENG ANISHNAWBEK

Compensation

- **Reasonable expenses are reimbursable**
- **Honorarium paid to Trustees and Liaisons**
  - Set amount based on policy laid out in the comprehensive plan
  - Amended through council resolution
  - Administrative trustee charges based on service agreement



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ATIKAMEKSHENG ANISHNAWBEK

Section 20

AUDIT & TRUST RECORDS

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ATIKAMEKSHENG ANISHNAWBEK

Audit & Trust Records



- **Access to information for Beneficiaries**
- **Trustee Responsibilities**
  - Keep documents up to date and detailed
  - Establishment of an office location
  - Record storage and maintenance
- **Inspection and Audit**
  - Records open for inspection by Council
  - Annual Financial Statements audited by independent qualified CPA, appointed by Trustees
  - Post audit financial statements available for members review

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ATIKAMEKSHENG ANISHNAWBEK

Audit & Trust Record

- **Records Maintenance – Stored by the trustees**
  - Trust deed copy
  - Receipt of settlement monies
  - Trustee records, meeting minutes and resolutions
  - Contractual obligations and financial records



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Section 21

VARIATIONS

80

ATIKAMEKSHENG ANISHNAWBEK

Amendments to the Trust Deed



- **Levels of amendment**
  - **Trustee and C&C with complementary resolution**
    - Change the name
    - Continued compliance with legislation
    - Remove conflicts or inconsistencies
    - Clerical in nature
    - Changes to tax legislation
  - **Members' consent (vote requirement) – large (substantive) changes**
    - Complementary resolution
    - Vote by a majority of members voting and **50%** of eligible members participate in the vote
- **Restrictions on Variation**
  - PCD changes
  - Inconsistencies with the purpose of the long-term benefit of Atikameksheng Anishnawbek
  - Amendments to the amendment section
  - Changes to definitions that will impact the amendment section

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ATIKAMEKSHENG ANISHNAWBEK

Questions?



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Trust Development Working Group Presents

COMMUNITY ENGAGEMENT SESSION #4B

June 23, 2025 - 5 pm - Dinner

6 pm - Presentation

Holiday Inn - 1696 Regent St, Greater Sudbury, ON P3E 3Z8

A Virtual Link is posted in the Members Portal

Join us for discussion and information session on the Trust Development Working Group to discuss the Atikameksheng Legacy Trust terms and the potential uses of trust funds. We want to ensure that the Atikameksheng Legacy Trust resonates with the values, aspirations, and vision of the Debendaagziwaad. Gain insights into the effects of Trusts on individuals and communities, enriching our discussions and guiding our decisions. Don't miss this opportunity

Please send general feedback and concerns to tdwg@wlfn.com.
Please contact Montana for transportation arrangements at execasst.council@wlfn.com or 705-929-0732

THIS SESSION IS FOR DEBENDAAGZIWAAD OF ALL AGES, WHO WANT TO LEARN MORE ABOUT THE LEGACY TRUST FUND.
(BAND MEMBERS ONLY)

ATIKAMEKSHENG
ANISHNAWBEK

TRUST DEVELOPMENT SURVEY

WE NEED YOUR VALUABLE FEEDBACK!

Scan the QR Code to take the survey or use the following link.

SURVEY

Miigwetch.

Answer our Trust Development Survey and enter to win one of three $1000 Gift Card.

ATIKAMEKSHENG
ANISHNAWBEK