



Clarien Corporate
Citizenship Report
SEPTEMBER 2019

Message From the Chairman



Ian Truran,
CEO Clarien Bank Limited

At Clarien, we pride ourselves in our commitment to bettering the Bermuda community. Through bi-annual corporate donations to local registered charities, as well as quarterly outreach activities for our employees, we work to ensure we are making a positive contribution to this island we call home. Our goal is to make a noticeable impact in Bermuda, by focusing our efforts on charities which aid in youth development, education, health and human services. We are delighted to continue our long-standing tradition of giving – this time by donating to a handful of worthy causes on the Island.

To find out more about the charities we are currently investing in, visit [Our Corporate Citizenship Report 2019](#).



About Clarien

Clarien Bank is one of the largest independent, privately-owned integrated financial services organisations in Bermuda, providing personal and commercial banking, private banking, and corporate banking to individuals, families and corporations in Bermuda and worldwide. Clarien Bank also provides a full range of investment products and brokerage services through Clarien Investments Limited.



Core Purpose & Mandates of the Foundation

Core Purpose

The Clarien Foundation is a charitable trust that oversees and executes all charitable endeavours and donations made by Clarien Bank. Our objective is to provide financial and in-kind support for charities and their fundraising events, helping to improve the lives of Bermudians and ultimately strengthening our community. The Foundation is also an ideal giving vehicle for clients, family and friends of Clarien who wish to create a legacy by giving to a specific charitable cause of their interest. Through the Clarien Foundation and Clarien Trusts Limited we can facilitate a structured charitable giving programme that aligns with your unique desires and values.

Our Mandate

- To make annual donations to registered charities;
- To aid and invest in areas such as youth development, education, health and human services;
- To demonstrate good corporate social responsibility through charitable donations, support for special fundraising events and an internal employee volunteer and giving sub-programme.

Our Giving Guidelines

Clarien is only able to give to not-for-profit organisations that are currently registered as a Bermuda registered charity. These organisations must have a responsible board of directors serving without compensation and be able to show financial stability as evidenced by annual financial statements. We also request that any organisation requesting financial support from Clarien be able to demonstrate they operate from a detailed annual budget and adhere to local and international Anti-Money Laundering (AML) and Anti-Terrorist Financing (ATF) regulations.



Our Commitment to the Community

We believe in the power of partnering with organisations in the community to help our neighbors in need. The Clarien Foundation's Charitable Policy encourages employee involvement in charitable events, allowing up to 20 hours per year per employee for volunteerism for Foundation-endorsed events.

The Foundation rewards Clarien employees and its subsidiary companies as follows for persons who volunteer outside of normal business hours in support of one of our partner charities:

- 10 hours eligible community service = ½ day paid vacation
- 20 hours eligible community service = 1 day paid vacation

The Clarien Cares Programme is an initiative that allows employees to participate in community outreach projects. The goal of the programme is to build team and social engagement across departments while providing direct assistance to the community. Employees may volunteer for one of three community outreach projects, which will focus on the following key areas:

- Seniors – Painting/maintenance of Seniors Home: example Agape House, Matilda Smith, Lorraine Williams Rest Home, Westmeath
- Youth – Planting and gardening at youth centre/community playground: example Teen Services, The Centre on Angle Street
- Environment – parks/beach/environmental clean-up: example KBB, the Bermuda Aquarium, Museum & Zoo/Bermuda Zoological Society, SPCA

The Clarien Foundation will match donations by employees up to \$500 dollars per year.



Summary of Recipients

Bermuda Centre for Creative Learning

www.bermudacreativelearning.com

The mission of the Bermuda Centre for Creative Learning (BCCL) is to empower students up to age 15, who have learning differences and learn best in a non-traditional environment that facilitates each student's individual learning style. Through research-based teaching strategies, their professionals, with diverse educational backgrounds, develop a personalised learning programme that challenges and cultivates each student. BCCL has low student to teacher ratio which allows students to work at their own skill level.



Bermuda Equestrian Federation

www.bef.bm

The vision of the Bermuda Equestrian Federation is to bring life-long passion and appreciation of horse sports to our community. Their mission is to achieve enjoyment and excellence through the development and support of equestrian sport in Bermuda and abroad.



Bermuda Cancer & Health

www.cancer.bm

Bermuda Cancer and Health Centre is a registered charity engaged in the prevention, detection and support of cancer and other health concerns in the local community. Their mission is to provide the highest standard of early detection, radiation treatment support, care and education for cancer and other diseases to all.



Bermuda Kappa League

www.bermudakappas.com

Bermuda Kappa League Guide Right Youth Development Program is intended for the educational and occupational guidance of youth, primarily inspirational and informational in character. Its reach extends to high schools and colleges alike. The purposes of the



Summary of Recipients

Guide Right Service Program are to place the training, experience, and friendly interest of successful men at the disposal of youth needing inspiration and counsel regarding their choice of a life's career, while the community is made aware of the problems that may be encountered as these youth seek to realize lives of usefulness.

Bermuda Youth Rugby

www.brfu.bm

Bermuda Rugby Football Union aim to promote the defining character-building traits of rugby; Integrity, Passion, Solidarity, Discipline and Respect. Youth rugby is run, in collaboration with Beyond Rugby, through kids Sunday morning rugby, middle school and high school competition for girls and boys. In addition, the BRFU sends youth national squads to overseas competition from U12 to U19 age groups. Youth teams have also gone on tours to the UK, US and Caribbean in recent years.



BSMART

www.bsmartfoundation.org

BSMART is committed to providing a solid foundation of learning through innovative brain-centered educational programs and services that enables all children to acquire social, emotional, and cognitive skills that are the foundation for future learning. BSMART believes in creating a community that maximizes the development of young people to achieve their physical, intellectual, and social potential, particularly those challenged by physiological and neurological deficits that later impede academic success.



Construction Association of Bermuda

<https://www.constructionassociationofbermuda.com/>

The Construction Association of Bermuda (CAOB) is dedicated to making the construction industry safer, more efficient, more competitive and better able to contribute to the development of Bermuda. CAOB's mandate is to ensure its Members have access



Summary of Recipients

to quality resources and employ best practices available to the construction industry.

Family Centre

<https://www.tfc.bm/>

Family Centre is an internationally accredited Bermuda charity. The organization was founded in 1990 and since 1996 has provided early intervention services to children who are suffering from family based problems such as abuse, neglect, and other emotional challenges. Through their specialized programmes and prevention initiatives, they provide families with the skills they need to be successful and to sustain that success for future generations.



Ignite

<https://www.ignitebermuda.com/>

Ignite Bermuda was created specifically for local innovators and start-ups with the drive and commitment to grow and scale their business. Ignite has teamed up with Entrepreneurial Spark to bring a truly global accelerator model to the ambitious entrepreneurs of Bermuda. By putting the entrepreneur at the heart of everything, Ignite Bermuda will build a community of entrepreneurs looking to make an impact on the island and around the world.



Knowledge Quest

www.knowledgequest.bm

Knowledge Quest was founded in early 2001 and became a registered charity in 2002. Providing education to those who need it most and will benefit most is the vision of Knowledge Quest. Their goal is to attract important investors so that they can continue to make a difference to many deserving individuals.



Summary of Recipients

Meals on Wheels

www.mealsonwheels.bm

The goal of Meals on Wheels is to prepare and deliver a nutritious meal to those in the community who are incapacitated or are otherwise unable to prepare a nourishing meal on their own and who have no caregiver, friend or family member who can consistently provide this service. Meals on Wheels ensures a healthy and nutritious meal is delivered to the elderly and housebound.



PALS

<https://www.pals.bm/>

P.A.L.S provide cancer patients with quality care primarily in the home setting in order to enhance their quality of life. They provide support and assistance to cancer patients and their families. P.A.L.S assist families meet physical, emotional and social needs of patients. They also promote health, dignity and independence for patients.



Team Hurricane Basketball Academy

<https://www.teamhurricanehoops.com/>

Team Hurricane Basketball Academy is Bermuda's first and original ELITE youth basketball academy. Their program features the top youth basketball players in the country. They build high character student-athletes who bring a commitment and joy to the game, as well as being distinguished for the integrity and class that they bring to the sport, their families and their community. Team Hurricane Basketball Academy provides a platform in which student-athletes can train, develop and reach their academic and athletic potential. They provide the best competitive basketball experience for student-athletes who want to pursue a college education.



Summary of Recipients

The Coalition for the Protection of Children

www.coalition.bm

Their mission is to heighten public awareness of children's issues, advocate on behalf of families and provide services which address critical but unmet needs. The Coalition ensure that an adequate safety-net exists for the prevention, intervention and treatment of children and families who have experienced trauma by working collaboratively with other helping agencies.



The Reading Clinic

<https://readingclinic.bm/>

The Reading Clinic was founded in 1968 by Bermudian Elizabeth ("Betty") Kitson, in response to the needs of children with a specific reading disability (dyslexia). Since that time it has grown from providing specialized tutoring, to an array of services designed to meet the needs of individuals with specific learning disabilities.



Tomorrow's Voices

www.tomorrowsvoices.bm

Tomorrow's Voices - Bermuda Autism Early Intervention Centre is designed to meet the individual needs of children who are diagnosed with Autism or on the Autism Spectrum between the ages of 2 and 21 years of age. Autism is characterized by severe and pervasive impairment in several areas of development: reciprocal social interaction skills, communication skills, or the presence of stereotyped (repetitive) behavior, interests, and activities.



WindReach Bermuda

<https://windreachbermuda.org/>

WindReach was officially opened on October 1, 1999. WindReach is unique in that it offers a variety of therapeutic and educational experiences for people with varying physical and intellectual abilities.



Summary of Recipients

Today, they have on average 200 participants benefitting from their programmes on a weekly basis. Participants range in age from pre-schoolers through to seniors in the community.

Young Men's Social Club

www.socialclub.bm

Young Men's Social Club of Bermuda has a legacy of professional sportsmanship on the local and international stage. They pride themselves on continuing their long history of talent development, community outreach and quality membership engagement. Their youth program is structured around the importance of Education and teaching the participants how Education and Football can be used in conjunction to achieve greater successes and opportunities in life.



Youth Net

www.youthnetbda.com

YouthNet has worked to unlock the potential in Bermuda's youth; stemming from their belief that all young people possess strengths and abilities necessary to succeed in life. The school-based mentoring programme seeks to align the strengths of these young people (mentees) with the strengths of adults and peers (mentors) in a positive and nurturing environment; promoting opportunities for young people to thrive through positive relationships. YouthNet provides a continuum of support to any child who should want one, helping to ensure that their lives are positively impacted. Their mission is to Empower students to make positive life choices through school-based mentoring.



How to Apply and Learn more About the Clarien Foundation

The Clarien Foundation

The Clarien Foundation is a charitable trust that oversees and executes all charitable endeavours and donations made by Clarien Bank. The Foundation is committed to making annual donations to Bermudian charities with the aim of making substantial improvements across youth development, education, health and human services. The Foundation includes charitable donations, support for special fundraising events and an internal employee volunteer sub-programme.

Not-for-profit organisations requesting financial support should generally meet the following criteria:

- Be registered with Bermuda Charity status
- Have a responsible board of directors serving without compensation
- Show financial stability as evidenced by annual financial statements
- Operate from a detailed annual budget

Application Process

To apply, please complete the Corporate Donation and Sponsorship Application Form found online at <https://clarienbank.com/about-us>, under the Community Involvement tab. Additionally, we ask for a letter requesting financial support or sponsorship, which indicates the following:

- The primary mission of your organization, with a description of its significant accomplishments and current programmes; including how you intend to sustain your respective initiative.



- The issue your programme/project seeks to address and the impact of this issue on the Bermuda community.
- The scope of the programme/project for which support is requested. You should also identify the target members of the community.
- The track record of the project/programme to be funded. If this is a new programme/project, discuss the accomplishments of the organization.
- The goal or expected outcome of the programme/project for which support is requested.
- An explanation of how the success of the programme/project will be measured and the results reported to Clarien Bank.
- Any additional statistics, facts or metrics to support the need for your services.

We also ask for you to submit a detailed business plan; a review of your organisation's progress and achievements in the previous year including quantifiable metrics; and a recent audited Financial Statement or detailed information on finances from the previous year.





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