



Transformational gift from a generous Winnipegger ***Largest gift made to a Canadian charity by an individual***

Winnipeg, MB (November 29, 2022) For Immediate Release – A local business owner and *quiet philanthropist* has given the largest gift ever made to a Canadian charity by an individual. The Winnipeg Foundation has announced an extraordinary unrestricted gift from the late Miriam Bergen, owner and president of Appleton Holdings Ltd. – a privately held company that carries on business as Edison Properties. The gift to the community, which includes the shares of Appleton, is believed to have a value of approximately \$500 million and was left to The Foundation through a bequest in Miriam Bergen’s will.

“It is with immense gratitude I am here today to announce a gift that will be transformational for our community,” said Winnipeg Foundation Board Chair Tom Bryk earlier today. “The late Miriam Bergen, President of Appleton Holdings, has left this unprecedented gift to The Winnipeg Foundation, and we are honoured by the trust she has placed in us. We anticipate when the gift is fully realized, it will provide significant additional resources into the community annually.”

“Here is another example of how the people of Manitoba are the most generous in the country. Miriam Bergen and her family have left an incredible legacy that will have a positive impact for generations to come and we thank them, from the bottom of our hearts.” he said.

“Giving to community organizations was a big part of how Miriam showed she cared about people,” shared Doris Gietz, Miriam Bergen’s cousin. “She had a love of humanity that came from her parents, my aunt and uncle. Their philanthropic values grew from the gratitude they felt when they immigrated to Canada.”

“Most of her giving was anonymous because it was the act of giving, not the recognition, that inspired her. However, I feel it is important for the community to know about this gift because it will make such a difference. It is the culmination of her quiet, lifelong generosity and will be the Bergen’s legacy,” she said.

“Miriam Bergen will be remembered as a visionary for our community. Her incredibly generous gift will transform The Winnipeg Foundation’s ability to support community,” said Foundation Chief Executive Officer Sky Bridges, at the announcement. “We look

Chief Executive Officer
Sky Bridges

Board of Directors

Tom Bryk, FCPA, FCA, ICD.D, CHAIR
David Barnard
George Bass, K.C., ICD.D
Hazel Borys
Tina Chen
Phil Chiappetta
Albert El Tassi, C.M., O.M., LL.D
Daniel Friedman

Tracy Graham, CPA, CA
Joy Loewen
Daniel Lussier
Patricia Mainville
John Pollard, TREASURER
Maureen Prendiville
Diane Roussin, M.S.M, BA, BSW
Anita Southall
Mayor Scott Gillingham, Ex-Officio

Appointing Board

Lieutenant-Governor of Manitoba
Chief Justice of Manitoba
Chief Justice of the Court of King’s Bench
Mayor of the City of Winnipeg
Registrar-General of Manitoba



forward with enthusiasm, commitment, and hope for Winnipeg's future, as we continue working to help ensure 'a Winnipeg where community life flourishes for all.' This stunning support from Miriam Bergen, and her love for our city and all who live here, will help us address Winnipeg's most pressing challenges today, and in the future."

-30-

Background:

Miriam Bergen was the President of Appleton Holdings Ltd., formerly Marlborough Developments, founded by her late parents, Martin and Ruth Bergen. She was a philanthropic leader in Winnipeg like her parents before her, supporting many organizations not only as a known donor but most often making private contributions to support a wide variety of local organizations that benefit the community.

Appleton Holdings Ltd owns and operates residential and commercial buildings in Winnipeg through Edison Properties, many of which are in the North Kildonan area of the city. All its employees will continue on a 'business as usual' basis, with the existing management structure and independent Board. The properties held by Appleton Holdings Ltd will support The Winnipeg Foundation's work in the community.

The Winnipeg Foundation is Canada's first community foundation, created in 1921 by businessperson William Forbes Alloway and his wife Elizabeth Alloway. In 2021, The Winnipeg Foundation distributed \$84.9 million to approx. 1,100 charitable organizations in the city. Miriam's gift will be part of our 'unrestricted' community fund. This fund gives The Foundation the flexibility to respond to the most pressing community needs.

In the past 100 years, The Winnipeg Foundation has granted more than \$780 million back to community **For Good**. As a public foundation based on the endowment model, gifts of all sizes are pooled and invested together and a portion of the earnings are granted back to the community, providing an ongoing stream of community support. **Forever.**

Media inquiries and to arrange interviews, contact:

LuAnn Lovlin, CFRE

Director of Communications & Marketing

The Winnipeg Foundation

E: llovlin@wpgfdn.org W: 204.944.9474 x 232 M: 204.781.9336



Additional Questions & Answers

Who was Miriam Bergen and her family?

Miriam Bergen worked hand in hand with her father and then later presided over Appleton Holdings Ltd, with a strength and dignity on which the company was founded by her late father, Martin Bergen. From an early age, Miriam was a constant figure by her father's side; often on job sites as Appleton Holdings (at the time Marlborough Developments) grew with the addition of properties throughout Winnipeg.

The Bergen family history and their impact on Winnipeg's landscape are well-known. Parents Martin and Ruth Bergen immigrated to Canada after WWII and instilled in Miriam a powerful sense of community. Miriam was a philanthropic leader in Winnipeg throughout her life; supporting many organizations, often making anonymous contributions to support a wide variety of local organizations.

True to her company's philosophy, that people not buildings are the heart of Appleton Holdings, Miriam took a life-long interest in people and often encouraged employees to pursue and further develop their talents, resulting in many experienced and long-term employees still with the company today.

Miriam took pride in the legacy built by her family. During her Presidency, the company took on several new developments in Winnipeg and ushered in continued growth, providing stability and jobs for employees and valued project partners – many of whom have long-standing relationships with the Bergen family.

When did The Foundation find out about this gift?

Several years prior to her passing, Miriam had been in contact with The Winnipeg Foundation to discuss options. The Foundation was contacted by the executors for Miriam Bergen's estate after her recent passing. There are several steps required in the process to facilitate a gift of this magnitude. We have been working together with Executors and Appleton Holdings senior management for several months to ensure a smooth transition of ownership of the company. It will take up to another year to complete the transition.

What is the difference between Edison Properties and Appleton Holdings?

Edison Properties is one of the businesses operating within Appleton Holdings.



Is The Winnipeg Foundation going to sell Appleton Holdings or Edison Properties?

Appleton Holdings Ltd. and Edison Properties will continue on a 'business as usual' basis, with the existing management structure and independent Board. The Foundation understands Miriam's wish that all their staff retain their roles and positions and has no plan to sell or dissolve Appleton Holdings Ltd. or Edison Properties.

How many properties does Appleton Holdings own/manage?

Currently there are 27 properties.

How many employees are in the Appleton group of companies?

Appleton currently has more than 200 employees, with additional employees coming on board when Bergen Gardens opens.

Based on the size of the gift, how much will this add to The Foundation's granting capacity each year?

We believe over time, once the gift is fully realized, it will significantly increase The Foundation's granting to the community, creating incredible impact on pressing local issues – today and forever. Currently, the exact amount is difficult to calculate.

When will the gift impact the community?

Community foundations are well-equipped to accept such gifts, however the processes take time. Due to the magnitude and complexity of Miriam's gift, there is no definitive timeframe on this, but everyone wants to proceed as expeditiously as possible to realize Miriam's vision for her gift.

How will this gift impact the community?

The Winnipeg Foundation's new Vital Signs 2022 report – due to be released early in the new year, along with its new, four-year Strategic Plan – will help guide its decision-making around focused areas of support most needed in the community. This unrestricted gift will help The Foundation concentrate its efforts more deeply.

Will The Winnipeg Foundation have to hire more staff to take on this type of gift?

It is very 'early days' in the process of determining additional staff or how we will organize our current capacity to ensure the donor's wishes are met. Determining how we move forward with this incredible gift to our community is all part of the work ahead for our Board and staff.



What will be the areas of priority for The Winnipeg Foundation with these additional resources?

The Foundation is currently finalizing its next Strategic Plan, and this increase in our capacity to support the community will be a top priority within the plan. As you can imagine, a gift of this magnitude will certainly impact our abilities to support the community, while ensuring the donor's legacy is fulfilled.

