



BC Unclaimed Property Society 2025-2028 Strategic Plan

BC Unclaimed Property Society (“BC Unclaimed”) has made remarkable progress since 2003, returning \$22 million to 11,000 British Columbians and making the largest single payment of \$2 million in 2023. Our impact stretches far beyond these numbers with an overall contribution of \$80 million to the Vancouver Foundation in support of healthy, vibrant, equitable and inclusive community initiatives across BC.

We look ahead today with confidence, celebrating years of dedication to reuniting British Columbians with their rightful property and investing in a healthy province along the way. Standing in our strongest financial position yet, we are excited to launch BC Unclaimed’s 2025-2028 Strategic Plan: *New Heights and Greater Impact*, reaffirming purpose and sharpening our focus on expanding our capacity to deliver on our purpose.

This strategic plan will complement an annual operational plan, ensuring that BC Unclaimed achieves our objectives over the next three years and prepares us to serve beyond 2028.

Our Vision

Every unclaimed fund has the power to create a better future for individuals and communities

Our Purpose

We enhance lives by locating and re-uniting unclaimed funds with their rightful owners, and by community focused charitable funding across British Columbia.

Under the Unclaimed Property Act, BC Unclaimed serves as the caretaker of unclaimed funds in the province. In this capacity, BC Unclaimed:

- Actively searches for owners of unclaimed money.
- Maintains a public, searchable database of unclaimed funds in BC.
- Processes claims to reunite rightful owners with their forgotten or unclaimed money.
- Works with companies, organizations, and government agencies to help them get unclaimed assets off their books.
- Protects the privacy of holders and claimants of unclaimed money; and
- Allocates a portion of unclaimed funds each year for charitable purposes.

Core Values

Innovation: Committed to continuous improvement and optimizing resources, we adapt to increase impact and stay ahead of changing needs.

Caring: We take meaningful steps to deepen engagement with our community, claimants, and partners, ensuring that our services are widely understood and accessible.

Excellence: Felt throughout our organization internally and externally, we are relied upon as a trusted and accountable employer, partner, and community resource.



Strategic Themes

Alongside our commitment to continued and stable operations, our 2025-2028 Strategic Plan will accelerate important work of BC Unclaimed. Our combined efforts over the next three years will achieve clear and measurable results to celebrate, and will focus on the following strategic themes:

1. Grow holder engagement and increase public awareness
2. Increase financial benefit and social impact for British Columbians
3. Foster a thriving workplace

Priorities

| Theme | Priorities | Measuring Success |
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| <p>Grow holder engagement and increase public awareness</p> | <ul style="list-style-type: none"> ▪ Implement new Communications Plan Goals & Objectives ▪ Develop new holder relationships and re-activate lapsed holder relationships ▪ Leverage communication channels to deepen current holder relationships ▪ Develop consistent method for gathering and sharing impact stories and expand audience ▪ Strengthen government relationships ▪ Build relationships with 3rd party validators ▪ Advocating for enhanced legislation for greater impact ▪ Leverage the use of technology, including social media to increase outreach ▪ Promote and share the BC model of unclaimed property management as a best practice in Canada and internationally | <ul style="list-style-type: none"> ▪ Increased diversity and number of holders ▪ Stronger partnerships ▪ Improved compliance ▪ More education and outreach initiatives offered |
| <p>Increase financial benefit and social impact for British Columbians</p> | <ul style="list-style-type: none"> ▪ Explore and incorporate best practises in location efforts nationally and internationally to boost re-unification rates ▪ Develop specific strategies targeted at re-unifications for vulnerable British Columbians ▪ Optimize management and utilization of data and technology infrastructure, ensuring robust IT and data security ▪ Implement and optimize PIMZ to improve efficiency and data security ▪ Safeguard unclaimed funds for perpetuity while optimizing financial benefit for good causes through partnership with Vancouver Foundation ▪ Maintain prudent investment policies that safeguard assets and generate sustainable return to support operational funding | <ul style="list-style-type: none"> ▪ Higher reunification rates ▪ Surplus unclaimed funds making social impact ▪ Optimized use of technology for public experience and security of data |
| <p>Foster a Thriving Workplace</p> | <ul style="list-style-type: none"> ▪ Strengthen onboarding and develop policies that promote inclusive, equitable, and accessible workplace ▪ Ensure continuous improvement in employee engagement, development, and workplace safety ▪ Communicate and celebrate milestones consistently | <ul style="list-style-type: none"> ▪ Enhanced employee satisfaction and connection to cause |



Measuring Success

BC Unclaimed is poised to amplify social impact across British Columbia in pursuit of our purpose. Over the course of this strategic plan, key measures of our success will be the Society's ability to collect more unclaimed funds from a greater number of holders, reunite a growing number of British Columbians with their rightful funds, and continue to share stories of personal impact of unclaimed funds and the impact of our charitable contributions to the Vancouver Foundation in support of community driven initiatives for social good. A robust commitment to reporting within this strategic plan will support the Board in their focus on governance responsibilities and will provide leadership the room to focus on implementation. The details of the plan remain at the strategic level. However, specific strategies and tactics as well as measures including revenue and budget goals will be set and approved by the Board of Directors annually.