



# Sawridge Trusts News

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## SPECIAL POINTS OF INTEREST:

Check out one beneficiary, Kerry Cardinal's, business venture!

[www.abora-recordings.com](http://www.abora-recordings.com)

Check out another beneficiary, Brenda Draney's, big win!

[www.canadianart.ca/foundation/programs/rbc/2009/07/23/rbc-winner](http://www.canadianart.ca/foundation/programs/rbc/2009/07/23/rbc-winner)

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## Trusts Office Opened

The Sawridge Trusts now have an office. It isn't exactly new—we've been here since November 2009. The Trustees hired a Trusts Administrator in September 2009. Prior to setting up the office, the Administrator was working from his home.

Beneficiaries of the Sawridge Band Intervivos Settlement and the Sawridge Trust now have a place to go to get information about the Trusts or potential benefits.

Since November, the office has been collecting the records of the Trusts, setting up the office (desks, computers, telephones), working on a web page, recruiting a chairperson for the Board of Trustees and clerical help, tracking down eligible beneficiar-

ies (see **Tracking Beneficiaries** later in this newsletter) and reviewing the performance of the Trusts since their creation in 1985.

Setting up the office was part of a



**Terrace Plaza Office Building from Calgary Trail, Edmonton**

plan approved in July 2009 by the Trustees. Some beneficiaries were involved in the Four Worlds study on the Trusts in January 2009. Part of the plan that came from that study was to set up an office and begin work-

ing on developing benefits (see **Defining Benefits** later in this newsletter).

The office is now open to assist Trustees with their work and to assist beneficiaries get answers to their questions or help on various issues.

You can call us or visit the office anytime from 8:30 AM to 4:30 PM Monday through Friday. Our address is 801, 4445 Calgary Trail, Edmonton (North of the Delta Hotel and West of the Radisson Hotel just off the Whitemud Freeway). You can call us toll-free at 1-888-988-7723.

## Tracking Beneficiaries

Since the Trusts were initially set up, 25 years ago, a lot of people have come and gone. The world has also changed a great deal.

Tracking the beneficiaries of the Trusts is more complicated than one would think. The Trusts were set up for members of the Sawridge First Nation but changes to the Indian Act and

decisions by the courts have made even that question a complicated process.

For the Sawridge Trust, the beneficiary list is clearer—if you are on the Band list, you are probably a beneficiary. For the Sawridge Band Intervivos Settlement, the rules are a bit more complicated. The Trusts have to

get people to apply so that the Trustees can match the applicants to the rules.

If you or someone you know hasn't applied yet, application forms are available from the Trusts office. We will mail, fax or email them to you. The review will likely begin in late May or early June 2010.



**Brian Heidecker, New Chair of the Sawridge Trusts Board of Trustees**

## The Trustees

The Trustees recently hired Mr. Brian Heidecker as the new Chair of the Board of Trustees. Brian will begin a three-year term as Chair on 10 May 2010.

Brian is a retired farmer from Castor, AB who now lives in Edmonton. He is presently also Chair of the University of Alberta Board of Governors and has served on many Boards, including the Board of the Bank of Canada.

In addition to the Chair, there are five Trustees serving the Sawridge Trusts: Clara Midbo, Catherine Twinn, Bertha L'Hirondelle, Roland Twinn and Walter Felix Twin.

The Trustees meet monthly, sometimes in Slave Lake and sometimes in Edmonton at the Trusts offices. They supervise the assets and business of the Trusts and decide upon the benefits and on eligible beneficiaries.

*“Providing benefits through dividends from the assets.”*

## Trust Assets

Trust assets consist of two holding companies, Sawridge Holdings Ltd and 352736 Alberta Ltd. These two holding companies are invested in a number of businesses.

The most visible of these assets are the Sawridge Inns located in Slave Lake, Peace River, Fort McMurray, Jasper and Edmonton, Alberta. In addition to these, the holding companies own the Sawridge

Truck Stop in Slave Lake, the Slave Lake Plaza and a number of properties and other small businesses.

The assets are managed for the Trusts by Sawridge Management which is run by a Board of Directors selected by the Trustees. The Board of Directors reports to the Board of Trustees and directs the management of the business investments of the Trusts through its

management team led by CEO John McNutt and CFO Susan Berggren. Company head offices are located in Edmonton.

Through these investments, the Trusts provide economic development, jobs and, through dividends from the companies, will eventually provide benefits to the beneficiaries into the future.

*“For our children and our children’s children”*



## Defining Benefits

Some First Nations receiving large land claims settlements or large profits from resource development have chosen to use some of the revenue to develop infrastructure and have distributed the rest to the membership. Sawridge First Nations chose a difference approach

by investing the income to provide future benefits to its members.

During the Four World consultations, many of the beneficiaries thought that “benefits should provide incentives for people to live in health and balance, rather than ‘rewarding’

people for making poor choices”. People also felt that: benefits needed to balance the needs of present and future generations; needed to recognize the unique needs and circumstances of each person; needed to respect unique life paths by provid-

## Defining Benefits (cont'd)

ing choices; needed to provide for individuals as well as for the community as a whole; and needed to balance the need for limits with flexibility.

Beneficiaries wanted benefits to provide insurance, support related to death and illness, support related to educational needs, support related to employment and entrepreneurship, support related to financial planning and management, support for housing, support for child and youth development, support for seniors, support for community unity, support for personal devel-

opment and cash disbursement.

Developing benefits that fit within the resources available from the Trusts' investments that meet the needs of the beneficiaries is a complicated balancing process.

Trustees have begun by defining four benefits packages: The Compassionate Care and Death Benefit, the Seniors' Support Benefit, the Health and Life Insurance Benefit and the Personal Development Benefit.

Plans for 2010 include work on a Child and Youth Development

Benefit, an Educational Benefit, and a Housing Support Benefit.

Since benefits provided to the beneficiaries need to fit in to the resources available through the Trusts' investments, the Trustees have to be careful to develop benefits within the limits that the investments will permit.

Information about the benefits will be provided to the beneficiaries as it becomes available.

*"...benefits should provide incentives for people to live in health and balance, rather than 'rewarding' people for making poor choices".*

## Meet The Trusts' Administrator

In September 2009, the Trustees hired a Trusts Administrator. **Paul Bujold** brings a broad range of experience to the job. Paul grew up in Cold Lake. He has a bachelor's degree in psychology and a master's degree in community development from the University of Alberta.

His work experience includes serving as Director of family and community services in Killam and Cold Lake, Alberta; as Executive Director of health services at Hobbema; as Director of Operations for the Bahá'í Community of Canada in Toronto; as a financial planner with London Life in Vancouver; as CEO for child and family services authority in Eastern Alberta, as Principal of a high school in Swaziland, Africa; and as a management consultant in Ontario,

BC, Alberta and Swaziland.

Paul's family is grown—he has three daughters, one working in molecular genetics at the U of A, one working in cell biotechnology at the U of A and one studying political science-development at Grant MacEwan. He also has one grand daughter.



**Paul Bujold,**  
**Trusts Administrator**

The Trustees plan to establish a branch office in Slave Lake as well as the main office in Edmonton.

Paul will be visiting the Slave Lake area on a regular basis and will be available to assist beneficiaries with accessing the benefits they need.

The office staff is there to answer your questions and hear your concerns. If there is anything that we can do or any information we can provide, we will try to do that immediately. If your problem requires

a decision from the Trustees regarding benefits, the matter will be brought to the trustees attention and you will be informed as soon as there is a decision.

Please let us know what you need and we will try to develop the resources to meet these needs.

## Sawridge Trusts

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Established in 1985 and 1986 by the Chief and Council of the Sawridge First Nation under Chief Walter P. Twinn, Sawridge Trusts were set up to provide economic development, potential for employment, create an avenue for self sufficiency, self assurance, confidence and financial independence for the members of the Sawridge First Nation.

Monies from oil and gas development were invested in a number of businesses owned by the Trusts to provide long-term benefits to the beneficiaries and their descendents.

At the time of their establishment, the Trusts were a unique solution to long-term economic development for First Nations. This speaks highly of the foresight and skill of their prime mover, Chief Walter Twinn.

# Making the Trusts Work for You

One of the ways in which you can make the Trusts work for you is to do some planning and include the Trusts in your planning. Most of the benefits that were recommended by the beneficiaries who participated in the Four Worlds study are small, focused benefits designed to help people develop their capacities and skills. There are no large distributions of cash planned in the immediate future.

The cash distribution of \$2,500 to the each member of the Sawridge Trust last December was an initial benefit to signal that the Trustees were actively involved in getting the benefits part of the Trusts implemented. Future benefits will likely be focused more on the areas identified by the beneficiaries in the study.

These areas, as previously pointed out, include help with education and training, help for child development, help for the elders, help with family illness and crises, help with financial planning and management, and help

with housing development. Benefits will be designed to first take advantage of existing government and agency programs, make the best use of personal resources and finally provide top-up support where needed.



**The Late Chief and Senator Walter P. Twinn,**

Using the Trusts' resources in this careful and measured way will help to ensure that these benefits are available for you and your children and your grandchildren.

If you are planning to go to school, the Trust office can assist you in finding and applying for resources to cover the cost of your education and, possibly, to supplement the financial support to ensure that you can take full advantage of your educational opportunity. The Trusts cannot pass the tests or get good grades. That is up to you.

If you are planning to save money for future needs and your retirement, the Trusts can help you with planning and may be able to even help out financially but the saving has to come from you.

There are many ways we can work together to make life better for you and your family.