



Couchiching First Nation

RMB 2027, R.R. #2

Fort Frances, ON

P9A 3M3

1-88-581-0249

COUCHICHING FIRST NATION

TRUSTEE APPLICATION

Couchiching First Nation is seeking applications for those interested in acting as a first Community Trustee of the soon to be formed **COUCHICHING FIRST NATION LEGACY TRUST**. This Trust will administer funds for the long-term benefit of Couchiching and its members. There is one (1) opening for a Community Trustee On-Reserve available at this time.

Community Trustee Role: Includes but is not limited to the following:

- Working with the corporate trustee, CIBC Trust Corporation, on the administration of the Trust in accordance with the provisions of a Trust Agreement, once in effect;
- Engaging, having oversight and liaising with professional advisors, including the investment consultant, investment managers, and an accountant;
- Participating in quarterly review and investment meetings, community meetings and update meetings with Chief and Council;
- Administering and where necessary, approving the disbursement of annual income to Couchiching First Nation, payment of expenses, investments, and permitted uses of Trust capital;
- Reporting to Chief and Council and members on the management of the Trust, including audited financial statements and other annual reports, estimates for minors, budget, and compliance reports;
- Reviewing and understanding financial reports and statements, investment concepts and reports; and
- Ensuring deadlines are met, including the annual trust tax filing, meeting dates, and reporting requirements.

Term: Either 2 or 4 years initially to allow for staggered terms. Thereafter, the term is for 4 years.

Time Commitment: The Community Trustee's term will officially start when the Trust is ratified. But the Community Trustees' input in the Trust creation stage is extremely valuable so Community Trustees should be available upon selection. Trustee Meetings usually last 2-3 hours and are generally scheduled each quarter or as needed, Monday to Friday during the day and will be held on reserve in person with appropriate safety precautions for covid or online through virtual meetings otherwise. Community meetings will likely be scheduled on evenings or weekends. More meetings are anticipated in the first year of the Trust's operation, but on average will be at a minimum of four (4) meetings per year. There is often more information shared by both mail and email outside of regularly scheduled meetings. More time for audit and tax reporting review is required from February to April annually.

Compensation: Paid an honorarium (rate to be set by Chief and Council) on a per-meeting basis. Reasonable expenses are also reimbursable.



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Training: Orientation held with the corporate trustee. Online training is required through the National Aboriginal Trust Officers Association provided by Lethbridge College. Additional training may be offered, for example on investments.

Minimum Member Community Trustee Requirements:

- ✓ Couchiching First Nation members 18 years and older
- ✓ Good character – references will be checked
- ✓ No record of bankruptcy
- ✓ Not a member of Chief and Council
- ✓ Resident of Canada for purposes of the *Income Tax Act*
- ✓ Must not be in arrears or default of any debt obligations to the First Nation or an entity wholly-owned by the First Nation
- ✓ Not convicted of an indictable/felony offence or any offence involving property held as a fiduciary or trustee
- ✓ Not declared mentally incompetent
- ✓ For this position, the Community Member Trustee must live on-reserve

Skill Sets That Help in This Role:

- ✓ Understanding of financial concepts including basic math skills, how to budget, and how to read a financial statement
- ✓ Understanding and interest in investment concepts including reading performance reports, knowing how stocks and bonds work
- ✓ Good decision-making skills
- ✓ Good written and verbal communication skills, including comfort in presenting to Chief and Council and at community meetings
- ✓ Meeting/adhering to deadlines
- ✓ Working well with a team
- ✓ Being open to correspond with members who might have questions

Application Process: Submit your completed application form to the Trust Selection Committee by no later than **September 15th, 2025 at 5 pm central time**. Applications can be submitted by email to the address below or by dropping a physical copy of the completed application to the Couchiching First Nation Administrative Building:

CIBC on behalf of the Trust Selection Committee

Email: Joy.Davis@cibc.com

The Trust Selection Committee will then conduct interviews and select Community Trustee for Chief and Council's approval.



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Couchiching First Nation Legacy Trust

Community Member Trustee Application

Use attachments if space is insufficient.

Full Name: _____

Couchiching First Nation Member (Status) Number:

Address: _____

Telephone #: _____ Email: _____

Check all that apply:

☐ Canadian resident for tax purposes

☐ Senior (over 65)

☐ Live on reserve

☐ Young Adult (under 30)

☐ Live off reserve

☐ Adult

Level of Education: ☐ Secondary School ☐ Post-secondary school

Investment Knowledge: ☐ not much ☐ basic ☐ average ☐ experienced

Computer skills: ☐ not much ☐ basic ☐ average ☐ experienced

Presenting experience: ☐ uncomfortable ☐ not much ☐ comfortable ☐ experienced

Check all that apply: ☐ 18 years and older

☐ No record of bankruptcy

☐ No debt default owing to Nation for mortgage, loan, advance or other agreements with Nation

☐ No conviction of an indictable/felony offence or any offence involving property held as a fiduciary or trustee

Occupation (please include former occupation, if you are now retired): _____



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Experience serving on boards or committees or making decisions: _____

What other skills, education, work, financial or life experience do you have which would help you fulfil the role and responsibility of being a Community Trustee?

Describe why you want to be a Trustee and your connection to Couchiching First Nation, and how you feel this helps you serve as a Community Trustee?



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References (not a family member) who can speak about your character and skills:

Name: _____

Contact Information (email/phone): _____

How long has this reference known you: _____

Name: _____

Contact Information (email/phone): _____

How long has this reference known you: _____

Questions? Please contact Joy Davis, CIBC Indigenous Trust, by:

- Email at Joy.Davis@cibc.com
- Telephone at (705)-957-7619.