2023 PLANNING DOCUMENT













CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

Your member guide to value-added options for the coming year

NOTES

CAASA
CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

CAASA Annual Conference 2022

- Our flagship conference is back & in-person! -

Nov 1 - 3, 2022

Omni Hotel, Montreal

Content brought to you by our Educational Partner:

BODHI RESEARCH GROUP

View 2021 Program **View 2022 Event Page**

SELECTED PAST SPEAKERS



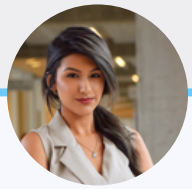
Elena Manola-Bonthond
Chief Investment Officer
CERN Pension Fund



Robin Lundgren
Quantitative Analyst
The Fourth Swedish National Pension Fund (AP4)



Jane Segal
Portfolio Manager
Healthcare of Ontario Pension Plan (HOOPP)



Akanksha Thakur
Equity, Diversity & Inclusion Hub
Simon Fraser University



Lindsay Saldanha
Associate Portfolio Manager
OPTrust



Millan Mulraine
Chief Economist
Ontario Teachers' Pension Plan



Ranjan Bhaduri
Founder & CEO, Bodhi
Research Group



Anne-Sophie van Royen
Senior Managing Director
La Caisse de Dépôt et Placement du Québec



Koblavi Fiagbedzi
Portfolio Manager & Head of Real Assets
CBC Pension Plan



Elizabeth Burton
Chief Investment Officer
Employees' Retirement System of the State of Hawaii



Marco Vetrone
Managing Director – International
Canada Pension Plan (CPP) Investments



Cara Nakamura
Managing Director, Financial Assets Division
Kamehameha Schools

Investors, Asset Managers, & Service Providers from Across Canada and the World

Special Day 1 Sessions for Investors and Sponsors only!

Exclusively for CAASA Members and Real Money Investors such as SFOs, SWFs, Pensions, Foundations, & Endowments

Maximum Venue Capacity of 250!

Guaranteed to Sell Out!

ABOUT CAASA

INCLUSIVE, ACTIVE, & PAN-ALTERNATIVE

The Canadian Association of Alternative Strategies & Assets (CAASA) was created in response to industry requests for a national group to represent the Canadian alternative investment participants, including investors, asset managers, and service providers. CAASA is inclusive in that it welcomes participation from all companies active in the space as well as select individuals (those with investors) who might want to participate in committees and working groups – or simply attend member events – without their employer being a member of the association. CAASA is very active in both committees & groups and events: 80+ events have occurred or are planned in 2020. Pan-alternative, for CAASA, encompasses all alternative strategies and assets including: hedge funds / alternative trading strategies, private and public real estate (funds and direct), private lending, private equity, development & project finance, digital assets / crypto-assets, weather derivatives & cat bonds, and all aspects of diligence, trading, structuring, dealing, and monitoring alternatives in a stand-alone portfolio and as part of a larger investment strategy.

NATIONAL AND GLOBAL

CAASA believes that the Canadian alternatives industry has a great deal to offer Canadians and the global community. The Canadian Model of Pension Management is well-known for its significant allocations to alternatives, managed in-house in many cases with substantial allocations to external managers as well.

Canadian investment managers operate in a robust regulatory regime (of hedge fund managers) that is becoming the norm across the globe and a stable banking back-drop that provides solace for investors as well as opportunities for managers. Of course, Canadian investors and managers are keen to learn of best practices in operations and portfolio management from their global peers.

MEMBER BENEFITS

Investors join CAASA to be a part of a formal network of pension plans, foundations, endowments, sovereign wealth funds, and family offices to discuss ideas, strategies, and operational issues particular to their businesses – all within a closed group where managers and service providers may or may not be included, depending on the forum.

Managers see the association as a way to connect with peers, investors, and service providers to speak to fund structuring, sales & marketing, and regulatory issues. While CAASA is not a capital introduction platform, we do create forums where investors and managers can meet organically or via structured meeting sessions, such as at this conference, where participation by the investors is strictly opt-in.

Service Providers participate in our events and working groups as well as assist in the production of thought leadership pieces which provide relevant information to both association members and the industry and investing public at large.

Start-up Founders, a category opened in Summer 2020, have a growing list of services and events tailored to their path to growth, including our Founders' Pitch Competitions held throughout the year.



OUR MEMBERSHIP

WE HAVE AN ALL-YEAR MEMBERSHIP DRIVE

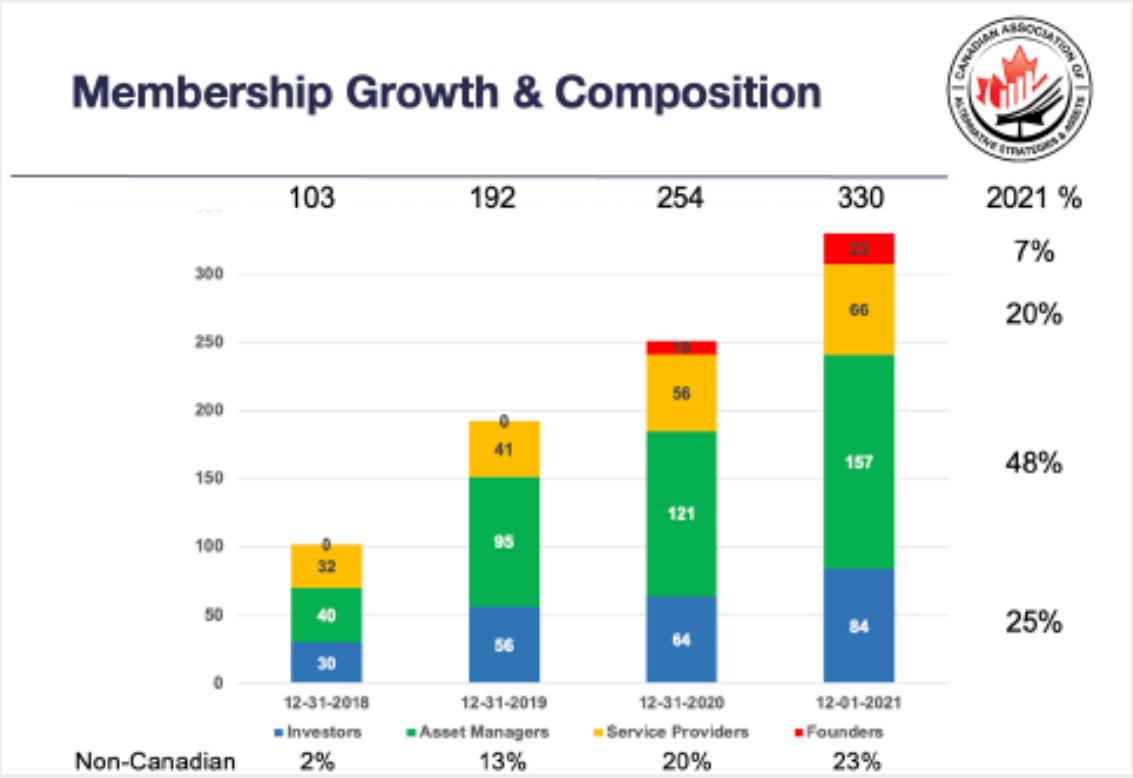
Over the last year we have exceeded our expectations for membership growth, which actually now stands at 340 members and with a fairly steady composition of ~25% investors, ~50% managers from all types of shops running many diverse alternative assets & strategies, and ~20% service providers - plus 23 start-up founders who may represent the next big companies in the world.



Our reach has increased over the last year or so as we stand at about 1 in ~4 members having no Canadian establishment (not even an employee or rep office stationed in the country) as many are seeing CAASA as their Canada play and making great use of our events and other initiatives to gain exposure to Canadian retail, HNW/family office, and/or institutional investors and/or asset managers. Of course, the prevalence of non-Canadian investors, especially family offices,pension plans, foundations & endowments, as well as sovereign wealth funds makes it more than just Canada that we are delivering to these managers.

As we progress, we will be focused on Canada and our market but also live up to our motto of bringing Canada to the world and the world to Canada - and welcome more non-Canadian members of all types.

The benefit to all members is the value of this network that begets larger audiences and more diverse panels and events than any other.



OVERVIEW OF OPPORTUNITIES



CAASA Signature Partner	**$30,000**	**Page 7**

Designed for members who wish to sponsor and send three delegates to three of our conferences and receive prominent exposure at the conference and all in-person events (see banner to the left), first rights of benefits, and complimentary passes to in-person social events.

CAASA Global Partner	**$50,000**	**Page 8**

In addition to the Signature Partner benefits, our Global Partners will see their own independent banner at all conferences and in-person events, logo displayed on homepage of our the website, and highlighted independently on our conference event pages.

Conference Sponsorship

Wealth Managers' Forum Vancouver, Calgary, Toronto, Montreal	**February, 2023**	**$2,500 per city** **$8,00 for four**	**Page 9**

All encompassing alternative conference designed for **Retail Advisors**

Family Office Summit Toronto	**April, 2023**	**$3,500**	**Page 10**

An alternative conference designed for **Single Family Offices, Multi-Family Offices**, and **Retail Advisors**

CAASA Alternative Perspectives **Vancouver**	**June, 2023**	**$3,500**	**Page 11**

Positioned opposite our CAASA Annual Conference, where alternative asset managers and service providers have the opportunity to speak to a global audience of Investors

Super Week: PE/VC + Crypto **Toronto**	**September, 2023**	**$3,500**	**Page 12**

Designed to highlight CAASA's diverse members in the Private Equity, Venture Capital, and Digital Assets space to educate a global audience of investors

FLAGSHIP CONFERENCE

CAASA Annual Conference Montreal	**November, 2023**	**$3,500**	**Page 13**

Our flagship conference brings institutional investors from across the globe focusing on key issues facing investors and managers in Canada and elsewhere including structuring, legal & tax issues, IT and operational areas, and investments

Events Sponsorships

Career Showcase **Virtual**	**January, 2023**	**$1,000**	**Page 17**	**Summer & Winter Socials** **Toronto, Montreal**		**$1,000**	**Page 19**
Ski Days **Calgary, Toronto, Montreal**	**Jan - Mar, 2023**	**$1,000**	**Page 18**	**Golf Tournament** **Toronto**	**September, 2023**	**$2,000**	**Page 20**

CAASA Papers / Primers

$2,000 - $20,000 **Page 21**

Part of our ongoing commitment to education in the alternatives space, CAASA – together with select members – commissioned and participated in these briefings and opportunities in the following alternative markets.

Previous topics include: Liquid Alternatives in the Canadian Market, ESG Paper, Blockchain and Crypto-Assets Explained, The Evolution of Quant, Private Equity & Venture Capital Primer, Investing in Real Estate and Private Lending

NOTES

CAASA SIGNATURE PARTNER

Our Signature Member package is designed for members who are active (or about to be!) and desire a more all-inclusive billing and offering experience. These members receive:

- Sponsorship & 3 delegate passes at any three of our five conferences:
  - Wealth Managers' Forum (Vancouver, Calgary, Toronto, Montreal - Feb)
  - Family Office Summit (Toronto - May)
  - CAASA Alternative Perspectives (Vancouver - June)
  - Super Week: PE/VC + Crypto (Toronto - Sept)
  - CAASA Annual Conference (Montréal - Nov)
- Branding at all conferences via special banner
- Complimentary sponsorship & 3 passes for our Founding Day Drinks and Socials (value of $5,000)
- Next call (in order of commitment date) on our additional exposure items (listed on page 15)
- Next call (in order of commitment date) on enhanced exposure items (listed on page 16) for the stated additional fees.
- 10% off sponsorship of our CAASA papers and primers initiated in 2023



As is our tradition, we treat all members equally for our speaking opportunities (191 in 2019 and 470 in 2020, est. 600 in 2021) and Signature Members are afforded the same opportunity to speak on and moderate panels and participate in podcasts.

Any CAASA member this is interested in becoming a Signature Member should contact the CAASA office – cost is $30,000 (no taxes) per calendar year (no proration) in addition to usual membership dues.



Signature Members are next in line (after Global Partners) for spots at all of our in-person events in 2023 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees) and we reserve at least 40% of tickets for investors (such as pensions and single family offices) leaving, at most, 150 tickets for our manager and service provider members which number more than 200 corporate entities. Signature Members have a guaranteed three passes per chosen conference (non-transferrable between conferences) while others are limited to two passes per in-person conference.

CAASA GLOBAL PARTNER

Our Global Partner package is meant for those who wish to get the most exposure possible from our audience. Not only will our Global Partners be featured prominently at any three of our five signature conferences, but will be highlighted independently on our website, banners, and where ever a CAASA banner is present (globally!).

Our Global partner will receive everything included for our signature partners in addition to:



- **First call (in order of commitment date) on our additional exposure items (listed on page 15)**
- **First call (in order of commitment date) on enhanced exposure items (listed on page 16) for the stated additional fees.**
- **Inclusion of swag item in gift box for all six conferences (item provided and delivered by sponsor)**
- **Branding on our website (priceless)**
- **Booth at each of the chosen in-person conferences ($6,000 value)**

As is our tradition, we treat all members equally for our speaking opportunities (191 in 2019 and 470 in 2020, est. 600 in 2021) and Global Partners are afforded the same opportunity to speak on and moderate panels and participate in podcasts.

Any CAASA member this is interested in becoming a Global Partner should contact the CAASA office – cost is $50,000 (no taxes) per calendar year (no proration) in addition to usual membership dues.



Global Partners received first spots at all of our in-person events in 2023 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees) and we reserve at least 40% of tickets for investors (such as pensions and single family offices) leaving, at most, 150 tickets for our manager and service provider members which number more than 200 corporate entities. Signature Members have a guaranteed three passes per chosen conference (non-transferrable between conferences) while others are limited to two passes per in-person conference.

WEALTH MANAGERS' FORUM

FEBRUARY, 2023 - VANCOUVER, CALGARY, TORONTO AND MONTREAL

SPONSORSHIP IS $2,500 PER CITY OR $8,000 FOR ALL 4 CITIES

SPONSORSHIP INCLUDES:

- ½ PAGE AD IN THE PROGRAM
- LOGO PLACEMENT ON THE WEBSITE, PROGRAM, VENUE, AND ALL ADDITIONAL MARKETING MATERIALS
- OPPORTUNITY TO PROVIDE A SWAG ITEM IN THE GIFT BOX SENT TO ALL DELEGATES
- ADDITIONAL COMPLIMENTARY EXPOSURE ITEM (SEE PAGE 15)
- OPPORTUNITY TO PURCHASE ENHANCED EXPOSURE ITEMS (SEE PAGE 16)
- TABLE TALKS

JOIN US, DOZENS OF SPEAKERS, AND SCORES OF FELLOW IAS AND INVESTORS FOR THIS ALL-ENCOMPASSING ALTS CONFERENCE SPECIFICALLY DESIGNED FOR RETAIL ADVISORS AND THE CLIENT BASE THEY SERVE.

DELEGATE REGISTRATION FEES

End Investor / Investment Advisor	Complimentary
Members of CAASA Asset Manager & Service Providers	$1,000

End Investor means Investment Advisors, single family offices, multi-family offices, and advisors in the HNW space.

YVR Event Page | YYC Event Page | YYZ Event Page | YUL Event Page

View 2022 Program | View 2022 Event Page

Capacity for each venue is limited: 50 persons in Vancouver/YVR, Calgary/YYC, and Montreal/YUL and 100 persons in Toronto/YYZ.

Thank you to our 2022 Sponsors

FAMILY OFFICE SUMMIT

APRIL 2023 - TORONTO

SPONSORSHIP IS $3,500

SPONSORSHIP INCLUDES:

- ½ PAGE AD IN THE PROGRAM
- LOGO PLACEMENT ON THE WEBSITE, PROGRAM, VENUE, AND ALL ADDITIONAL MARKETING MATERIALS
- OPPORTUNITY TO PROVIDE A SWAG ITEM IN THE GIFT BOX SENT TO ALL DELEGATES
- ADDITIONAL COMPLIMENTARY EXPOSURE ITEM (SEE PAGE 15)
- OPPORTUNITY TO PURCHASE ENHANCED EXPOSURE ITEMS (SEE PAGE 16)
- TABLE TALKS

THE FAMILY OFFICE SUMMIT IS A CONFERENCE DESIGNED TO BRING IN SINGLE FAMILY OFFICES AND MULTI-FAMILY OFFICES, WHERE WE COVER AND ARRAY OF ALTERNATIVE STRATEGIES AND TOPICS SPECIFICALLY TAILORED FOR THE FAMILIES.
OUR 2022 FAMILY OFFICE CONFERENCE SOLD OUT IN FEBRUARY! THIS IS A CONFERENCE THAT YOU DON'T WANT TO MISS.

DELEGATE REGISTRATION FEES

End Investor (Single Family Offices, Investment Advisors)	Complimentary	Asset Managers: <50 Million AUM	$1,250
Intermediary Investor/Consultant +1	$160	Asset Managers: 50 - 500 Million	$1,750
Core Service Provider	$2,750	Asset Managers: 500 - 1,000 Million	$2,250
Ancillary Service Provider	$1,750	Asset Managers: >1 Billion Aum	$2,750

End Investor means single family offices, and Investment Advisors in the HNW space. Intermediary investors means Multi-family offices and investment consulting companies and +1 means the first delegate is gratis but each additional delegate attracts a small charge. Manager and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate sub-category. Core service providers include prime brokers, fund administrators, and accounting and legal firms.

View 2022 Program | View 2022 Event Page | View 2023 Event Page

Thank you to our 2022 Sponsors

CAASA ALTERNATIVE PERSPECTIVES

JUNE 2023 - VANCOUVER

SPONSORSHIP IS $3,500

SPONSORSHIP INCLUDES:

- ½ PAGE AD IN THE PROGRAM
- LOGO PLACEMENT ON THE WEBSITE, PROGRAM, VENUE, AND ALL ADDITIONAL MARKETING MATERIALS
- OPPORTUNITY TO PROVIDE A SWAG ITEM IN THE GIFT BOX SENT TO ALL DELEGATES
- ADDITIONAL COMPLIMENTARY EXPOSURE ITEM (SEE PAGE 15)
- OPPORTUNITY TO PURCHASE ENHANCED EXPOSURE ITEMS (SEE PAGE 16)
- TABLE TALKS

THE CAASA ALTERNATIVE PERSPECTIVES IS POSITIONED OPPOSITE OF OUR ANNUAL CONFERENCE WHERE ASSET MANAGERS AND SERVICE PROVIDERS HAVE THE OPPORTUNITY TO PRESENT TO OUR GLOBAL AUDIENCE OF INVESTORS.

DELEGATE REGISTRATION FEES

End Investor (Single Family Offices, Investment Advisors)	Complimentary	Asset Managers: <50 Million AUM	$1,250
Intermediary Investor/Consultant +1	$160	Asset Managers: 50 - 500 Million	$1,750
Core Service Provider	$2,750	Asset Managers: 500 - 1,000 Million	$2,250
Ancillary Service Provider	$1,750	Asset Managers: >1 Billion Aum	$2,750

End Investor means single family offices, and Investment Advisors in the HNW space. Intermediary investors means Multi-family offices and investment consulting companies and +1 means the first delegate is gratis but each additional delegate attracts a small charge. Manager and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate sub-category. Core service providers include prime brokers, fund administrators, and accounting and legal firms.

View 2022 Program | View 2022 Event Page | View 2023 Event Page

Thank you to our 2022 Sponsors

SUPER WEEK 2023 : PE/VC + DIGITAL ASSETS

SEPTEMBER 2023 - TORONTO

SPONSORSHIP IS $3,500

SPONSORSHIP INCLUDES:

- ½ PAGE AD IN THE PROGRAM
- LOGO PLACEMENT ON THE WEBSITE, PROGRAM, VENUE, AND ALL ADDITIONAL MARKETING MATERIALS
- OPPORTUNITY TO PROVIDE A SWAG ITEM IN THE GIFT BOX SENT TO ALL DELEGATES
- ADDITIONAL COMPLIMENTARY EXPOSURE ITEM (SEE PAGE 15)
- OPPORTUNITY TO PURCHASE ENHANCED EXPOSURE ITEMS (SEE PAGE 16)
- TABLE TALKS

SUPER WEEK IS DESIGNED TO HIGHLIGHT CAASA'S DIVERSE MEMBERS IN THE PRIVATE EQUITY, VENTURE CAPITAL, AND DIGITAL ASSETS SPACE TO EDUCATE A GLOBAL AUDIENCE OF INVESTORS

DELEGATE REGISTRATION FEES

End Investor (Single Family Offices, Investment Advisors)	Complimentary	Asset Managers: <50 Million AUM	$1,250
Intermediary Investor/Consultant +1	$160	Asset Managers: 50 - 500 Million	$1,750
Core Service Provider	$2,750	Asset Managers: 500 - 1,000 Million	$2,250
Ancillary Service Provider	$1,750	Asset Managers: >1 Billion Aum	$2,750

End Investor means single family offices, and Investment Advisors in the HNW space. Intermediary investors means Multi-family offices and investment consulting companies and +1 means the first delegate is gratis but each additional delegate attracts a small charge. Manager and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate sub-category. Core service providers include prime brokers, fund administrators, and accounting and legal firms.

View 2022 Program | View 2022 Event Page | View 2023 Event Page

Thank you to our 2022 Sponsors

FLAGSHIP

CAASA ANNUAL CONFERENCE

NOVEMBER 2023 - MONTREAL

SPONSORSHIP IS $3,500

SPONSORSHIP INCLUDES:

- ½ PAGE AD IN THE PROGRAM
- LOGO PLACEMENT ON THE WEBSITE, PROGRAM, VENUE, AND ALL ADDITIONAL MARKETING MATERIALS
- OPPORTUNITY TO PROVIDE A SWAG ITEM IN THE GIFT BOX SENT TO ALL DELEGATES
- ADDITIONAL COMPLIMENTARY EXPOSURE ITEM (SEE PAGE 15)
- OPPORTUNITY TO PURCHASE ENHANCED EXPOSURE
- ITEMS (SEE PAGE 16)
- TABLE TALKS

OUR FLAGSHIP CONFERENCE BRINGS INSTITUTIONAL INVESTORS FROM ACROSS THE GLOBAL FOCUSING ON KEY ISSUES FACING INVESTORS AND MANAGERS IN CANADA AND ELSEWHERE INCL. STRUCTURING, LEGAL & TAX ISSUES, IT & OPERATIONAL AREAS, & INVESTMENTS

DELEGATE REGISTRATION FEES

End Investor (Single Family Offices, Investment Advisors)	Complimentary	Asset Managers: <50 Million AUM	$1,250
Intermediary Investor/Consultant +1	$160	Asset Managers: 50 - 500 Million	$1,750
Core Service Provider	$2,750	Asset Managers: 500 - 1,000 Million	$2,250
Ancillary Service Provider	$1,750	Asset Managers: >1 Billion Aum	$2,750

End Investor means single family offices, and Investment Advisors in the HNW space. Intermediary investors means Multi-family offices and investment consulting companies and +1 means the first delegate is gratis but each additional delegate attracts a small charge. Manager and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate sub-category. Core service providers include prime brokers, fund administrators, and accounting and legal firms.

View 2022 Program | View 2022 Event Page | View 2023 Event Page

Thank you to our 2021 Sponsors

CAASA
CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

CAASA Annual Conference 2022

- Our flagship conference is back & in-person! -

Nov 1 - 3, 2022

Omni Hotel, Montreal

Content brought to you by our Educational Partner:

BODHI RESEARCH GROUP

SELECTED PAST SPEAKERS



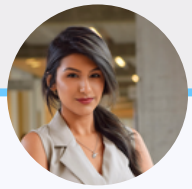
Elena Manola-Bonthond
Chief Investment Officer
CERN Pension Fund



Robin Lundgren
Quantitative Analyst
The Fourth Swedish National Pension Fund (AP4)



Jane Segal
Portfolio Manager
Healthcare of Ontario Pension Plan (HOOPP)



Akanksha Thakur
Equity, Diversity & Inclusion Hub
Simon Fraser University



Lindsay Saldanha
Associate Portfolio Manager
OPTrust



Millan Mulraine
Chief Economist
Ontario Teachers' Pension Plan



Ranjan Bhaduri
Founder & CEO, Bodhi
Research Group



Anne-Sophie van Royen
Senior Managing Director
La Caisse de Dépôt et Placement du Québec



Koblavi Fiagbedzi
Portfolio Manager & Head of Real Assets
CBC Pension Plan



Elizabeth Burton
Chief Investment Officer
Employees' Retirement System of the State of Hawaii



Marco Vetrone
Managing Director – International
Canada Pension Plan (CPP) Investments



Cara Nakamura
Managing Director, Financial Assets Division
Kamehameha Schools

Investors, Asset Managers, & Service Providers from Across Canada and the World

Special Day 1 Sessions for Investors and Sponsors only!

Exclusively for CAASA Members and Real Money Investors such as SFOs, SWFs, Pensions, Foundations, & Endowments

Maximum Venue Capacity of 250!

Guaranteed to Sell Out!

COMPLIMENTARY SPONSOR EXPOSURE ITEMS

All conference sponsors are eligible to receive, without additional cost, the following exposure items at our in-person conferences (as applicable to the program and venue capacity/capabilities):

Morning Run/Yoga/Exercise
• Breakfast
• Morning Break
• Lunch
• Afternoon Break
• Evening Reception (may include wine-tasting or the like)
• Tête-à-tête meeting times (usually 2 per day)
• Lanyards (provided and delivered by the member)
• Portable phone chargers

These exposure items are apportioned on a first-come basis to members as they commit to sponsoring the event. Global Partners have first call on any remaining item from when they commit to that level of sponsorship and Signature Members have next call on any remaining item once Global Partners have had their turn. (Signature Members will receive their option at least one month prior to the event, in any case.) Choice of exposure items then goes to other sponsors in the order in which the committed to the conference.
When a speaker might be keynote during a meal, sponsorship does not include any sort of speaking (intro, thanks, moderation, nor presentation) by the member. Their attachment to the timing will be mentioned and, as applicable, acknowledged visually but that is it.



Meals & Breaks



Lanyards (included)



Phone Chargers



Evening Reception



Tête-à-têtes

ENHANCED SPONSOR EXPOSURE ITEMS

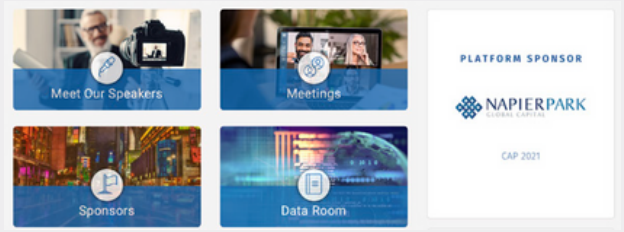
RANGE OF SPONSORSHIP OPPORTUNITIES

• Hotel keycards (likely only for CAASA Alternative Perspectives & CAASA Annual Conference): usually $1,500 for the keycard logo placement + $500 for keycard protective sleeve logo placement
• Program (logo on cover page): $1,500 per conference
• Meeting platform (logo on each login page and emails): $3,000 per conference
• Boat cruise or golf outing (possibly for CAASA Alternative Perspectives): $5,000 each
• Espresso coffee bar & barista (including logo placement on froth): TBD; likely $3,000
• Others as they present themselves...

These exposure items are purchased on a first-come basis to members as they commit to sponsoring the event. Global Partners have first call on any remaining item from when they commit to that level of sponsorship and Signature Members have next call on any remaining item once Global Partners have had their turn. (Signature Members will receive their option at least one month prior to the event, in any case.) Choice of exposure items then goes to other sponsors in the order in which the committed to the conference.



Program ($1,000)



Meeting Platform ($3,000)



Curling & Reception (CAC22, $1,500)





Booth ($2,000)



Boat Cruise (CAP22, $5,000)



Hotel key cards ($1,500+)



Fancy Coffee (~$3,000)

CAREER SHOWCASE

January 21, 22, 28, 29, 2023 - Virtual

SPONSORSHIP IS $1,000

All sponsors also host a Corporate Culture Chat which is a 1-hour Zoom exclusive to the sponsor where they explain their sector/strategy/asset class to the students as well as career opportunities and what it's like to work at their shop. We suggest a range of professionals from a variety of roles participate in this session to explain what they do and why they chose the company.

Sponsorship Includes:
½ page ad in the program
Logo placement on the website, program, and all additional marketing materials
A folder with all participating students' resume and cover letter (agreed to by the students)

View 2022 Program | View 2022 Event Page | View 2023 Event Page

THANK YOU TO OUR 2022 PARTICIPANTS





CAASA SKI DAYS

Sponsorship is $1,500 or $3,000 for all three

Toronto - January 26, 2023 – Osler Bluff Ski Club, Blue Mountains
Montreal - February 20, 2023 – Club de Ski Mont Habitant
Calgary - April 3, 2023 – Sunshine Village Ski Resort, Banff

Sponsorship includes 3 passes, logo placement on the event page.
We may produce a swag item including sponsor logo (best-efforts basis).
Sponsors can include one of their swag items in the gift bag if they like.

Registration Fees	
Members of CAASA	$100
Non-Members of CAASA	$150

View Toronto Event Page

View Calgary Event Page

View Montreal Event Page



CAASA SOCIALS

Sponsorship is $1,000 or $4,000 for all 2023 Socials

Founding Day Drinks:
Toronto - February 2, 2023 - Cambridge Club
Montreal - February 9, 2023

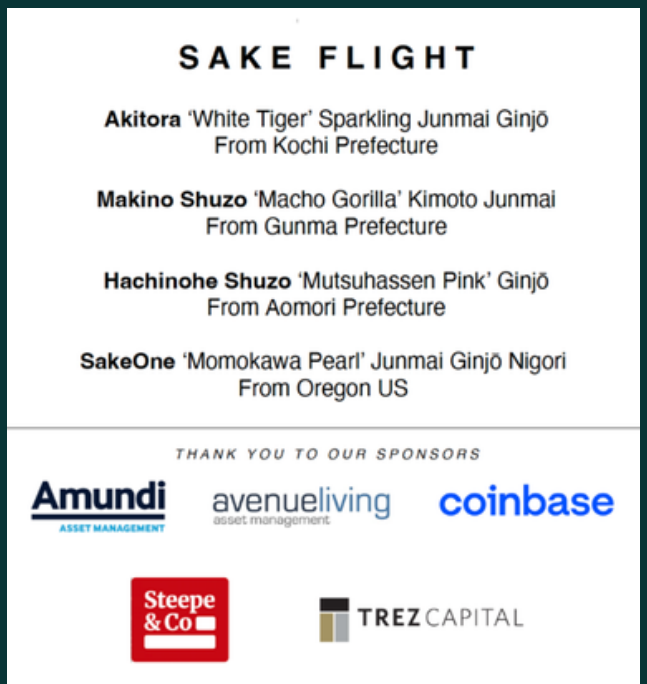
Summer Socials:
Toronto - July, August, & September

Holiday Social:
Toronto - December, 2023 - Cambridge Club

Sponsorship includes 4 passes, logo placement on the event page and at the venue (see images below)

Registration Fees	
Members of CAASA	**$30**
Non-Members of CAASA	**$50**

View 2022 Summer Social Event Page







CAASA Charity Golf Tournament

Range of Sponsorship Opportunities $500 - $5,000

Angus Glen Golf Club, 10080 Kennedy Rd, Markham, ON L6C 1N9

Join us for a fun day on the green at Angus Glen Golf Club, home of the 2002-2007 Canadian Open and host venue for the 2015 Pan Am Games!

We welcome a diverse group of investors, managers, and service providers from Canada and the U.S. playing in support of our soon to be announce charity

- **Hole sponsorship - $500**
- **Hole-in-one - $1,000 ($30k car) and $2,000 ($50k car)**
- **Cocktails - $2,000 (up to 3 non-competing sponsors)**
- **Lunch - $1,500 (single sponsor only)**
- **Dinner - $1,000 (up to 3 non-competing sponsors)**
- **Ice cream - $1,500 (single sponsor only)**
- **Golf carts - $2,500 (single sponsor only, all day exposure)**
- **Photography (sponsor logo on image) - $1,000 (up to 3 non-competing sponsors)**
- **Closest to the pin - $1,500 (Mens/Ladies)**
- **Straightest Drive - $1,500 (Mens/Ladies)**
- **Longest Drive - $1,500 (Mens/Ladies)**
- **Lunch box sponsor - $1,500 (single sponsor only)**
- **Drink Cart sponsor - $2,500 (single sponsor only)**
- **Air Cannon sponsor - $1,500 (single sponsor only)**
- **Ball sponsor - 3 options:**
- **$1,000 (sponsor to provide existing sponsor branded golf balls)**
- **$4,000 (sticker wrapped boxes with sponsor logo and CAASA branded balls)**
- **$5,000 (solely sponsor branded balls, printed by CAASA)**

Registration Fees	
Single Golfer	$500
Foursome	$2000

View 2022 Event Page

View 2023 Event Page

CAASA PAPERS / PRIMERS

RANGE OF SPONSORSHIP OPPORTUNITIES

As you might recall – and possibly participated in – we have produced numerous CAASA Primers over the last 3 years.

These were foundational pieces, meant to get readers up the curve in a variety of alternative areas of interest and we've had great reviews from participants and readers and we will continue to offer this format – plus a great deal more.











A choice of packages. As detailed below, we are offering a range of price and service options.
We will produce each topic in ONE format only. We need to have at least four participating members and cap participation at eight members.
Through our relationship with them, we can get a one-time fee for a PR campaign that would cost at least $30,000 per member & spread the cost across many. They also have extensive experience in survey writing, canvassing, and analytics that we can get on a bulk basis ($30,000+ cost if a member were to perform one on their own).

Format one: Primer (same as before) - $2,000 per member (samples on our Publications Page)

Hill + Knowlton will have one of their writers contact your spokesperson (PM, CIO…) 1-2 times for 30-60 minutes.

Distribution of soft copy on CAASA website, social media, email info packages to prospective members

Printing of 1,000 copies of to be distributed in info-packages at our 5 annual conferences + the 25 CAASA attend globally each year

Format 2: Primer + PR campaign - $10,000 per member

As above plus media relations around the paper and participants including tier 1 publications and niche & vertical market publications nationally, coverage monitoring, and production of final media impact report

We'd love to get on BNN, in trade publications like Advisor's Edge, Wealth Professional, Bloomberg, and other relevant media for the topic

We do not guarantee any 1:1 interviews or the like with any participant, but that is our goal

Format 3: Primers + PR + Industry Survey - $20,000 per member

Everything in formats 1 & 2

Public opinion survey including creation and programming of a national opinion survey (target households >$100,000 income), field implementation, and analysis & reporting.

Target market is 'the public' but with qualifiers such as income – the more targeted the survey, the more we might need to adjust the package price (e.g., an Investment Advisor or pension fund CIO survey would be much more expensive unless a list of leads was supplied to H+K)

The PR around this package will include that of the survey and we may produce the primer + a survey booklet or simply a combined publication

NOTES

For more information on CAASA membership, initiatives, and events, please contact:

Caroline Chow
Co-Founder & Partner
caroline@caasa.ca
(647) 953-0737 ext. 2

James Burron, CAIA
Co-Founder & Partner
james@caasa.ca
(647) 525-5174

Paul Koonar
Partner
paul@caasa.ca
(647) 953-0737 ext. 1

Suite 2500, 120 Adelaide Street West
Toronto, Ontario
M5H 1T1