



**5% Discount on all
sponsor packages until
Aug 31st.**

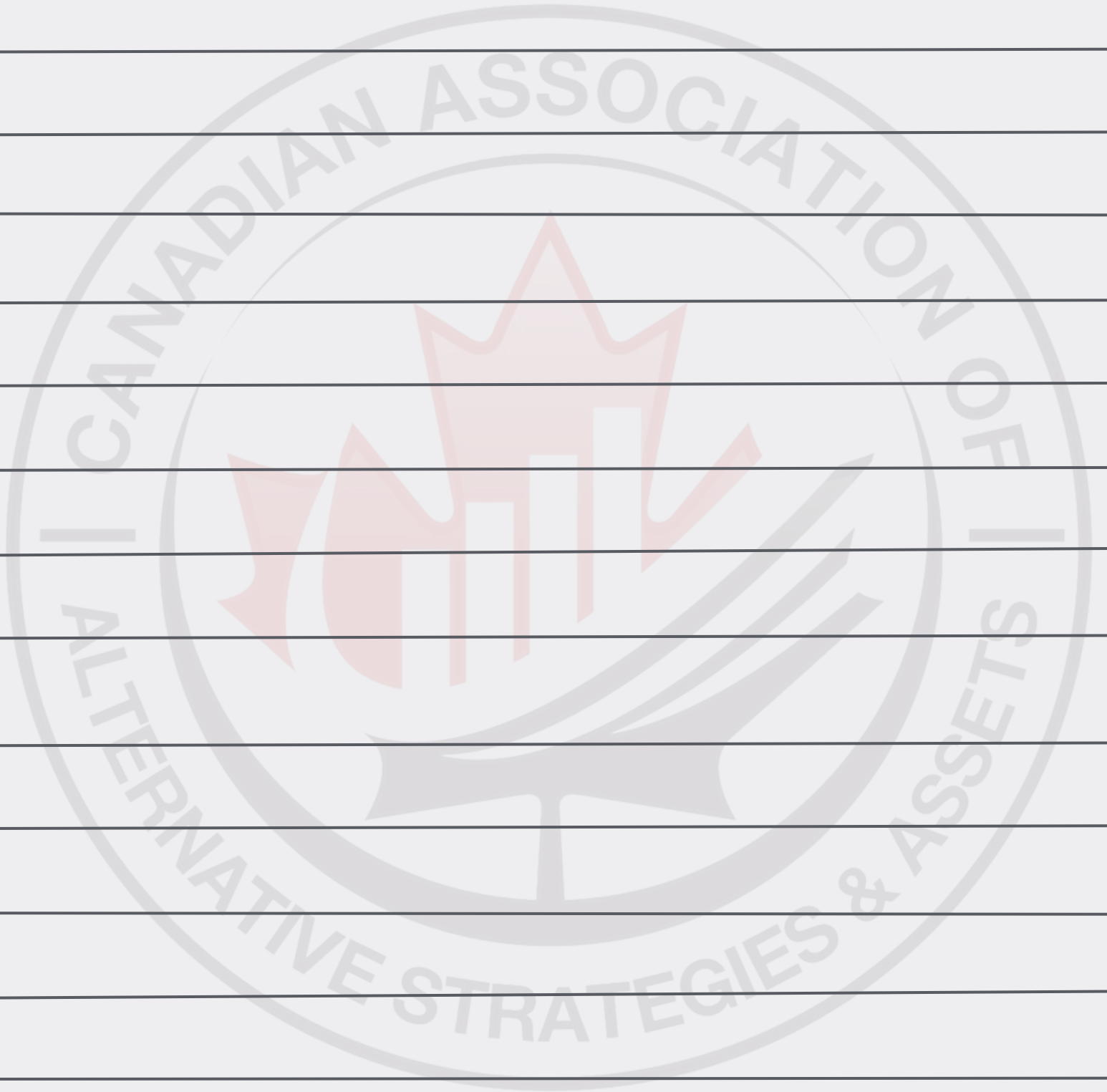
CAASA'S 2024 PLANNING DOCUMENT

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



CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

NOTES



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: at least seven conferences are planned in 2024. 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

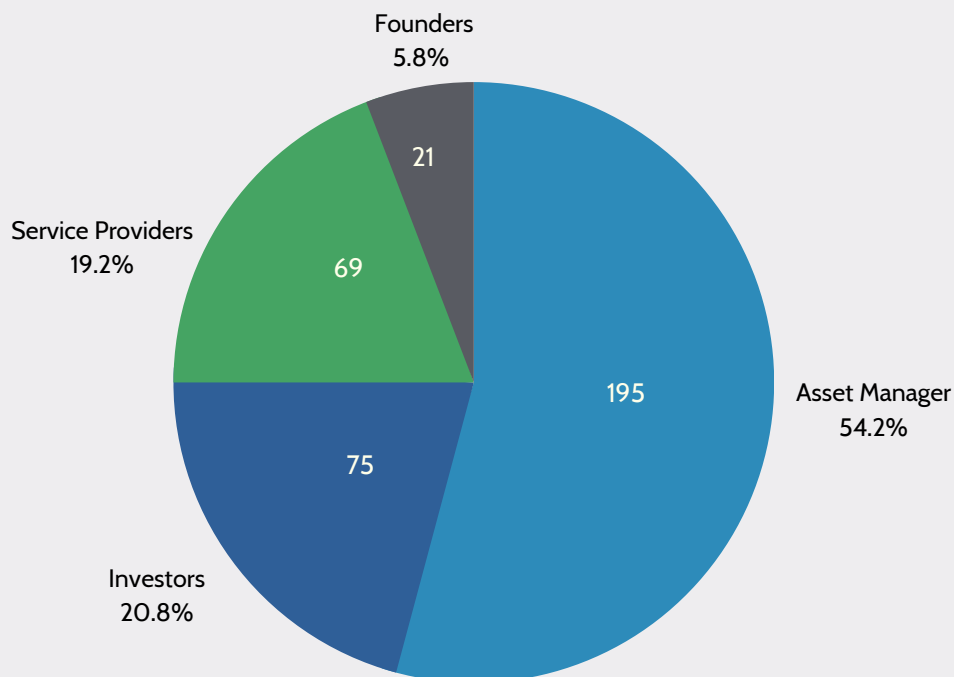
Over the last year we have exceeded our expectations for membership growth, which actually now stands at 360 members and with a fairly steady composition of ~20% investors, ~50% managers from all types of shops running many diverse alternative assets & strategies, and ~20% service providers - plus 21 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

Below are sponsorship costs, registration fees can be found throughout the booklet



CAASA 2024 Gold Partner **\$30,000** [Page 5](#)

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 2024 Platinum Partner **\$50,000** [Page 6](#)

In addition to the Gold Partner benefits, our Platinum Partner 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, discounted pricing, and much more!

Conference Flagship Conferences

Family Office Summit **April, 2024** **\$3,000+** [Page 10](#)

Toronto

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

CAASA Annual Conference **November, 2024** **\$3,000+** [Page 14](#)

Montreal

This conference brings institutional investors from across the globe focusing on key issues facing investors and managers in Canada and elsewhere.

CAASA Thematic Conferences

Wealth Managers' Forums **March, 2024** **\$2,000+ per city** [Page 9](#)

Montreal & Toronto

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

Private Equity & Venture Capital Assembly **June, 2024** **\$2,000+** [Page 11](#)

Toronto

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

Digital Assets & Blockchain Day **June, 2024** **\$2,000+** [Page 12](#)

Toronto

Our digital assets and blockchain conference brings together allocators and institutional quality speakers in the digital assets space

CAASA's Real Assets & Private Lending Focus **September, 2024** **\$2,000+** [Page 13](#)

Toronto

CAASA's first for 2024! This conference will bring together managers, service providers, and global allocators in the real assets and lending space

Compliance & Operations Dialogue **November, 2024** **\$2,000+** [Page 15](#)

Toronto

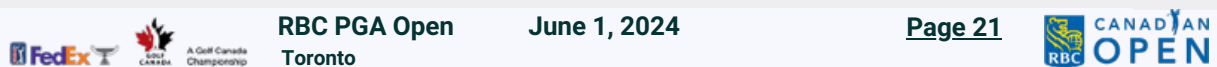
This event will bring together service providers and those who work in compliance and operations departments for Asset Managers

Social Sponsorships

Fall, Summer & Winter Socials **\$1,000 per social** **Page 19** **Golf Tournament** **July, 2024** **\$2,000 +** [Page 20](#)

Toronto, Montreal

Toronto



RBC PGA Open
Toronto

June 1, 2024

[Page 21](#)

CANADIAN OPEN

Other Opportunities

Papers / Primers **\$3,000** **Page 22** **Membership Directory** **\$1,000 +** [Page 22](#)

CAASA 2024 GOLD PARTNER

Our 2024 Gold Partner 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 conferences:
 - Wealth Managers' Forum (Montréal, & Toronto - March)
 - Family Office Summit (Toronto - April)
 - Private Equity & Venture Capital Assembly (Toronto - June)
 - Digital Assets & Blockchain Day (Toronto - June)
 - Real Assets & Private Lending Focus (Toronto - September)
 - CAASA Annual Conference (Montréal - November) [Flagship]
 - Compliance and Operations Dialogue (Toronto - November)
- \$5,000 discount to be a conference Title Sponsor (Page 7)
- Branding at all conferences via Gold Partner banner
- Complimentary sponsorship & 3 passes for our Founding Day Drinks and numerous Summer & Holiday Socials (value of \$5,000+)
- Next call (in order of commitment date) on our additional exposure items (listed on page 16)
- Next call (in order of commitment date) on enhanced exposure items (listed on page 17) for the stated additional fees
- 10% off sponsorship of our CAASA papers and primers initiated in 2024



As is our tradition, we treat all members equally for our speaking opportunities and Gold Partners are afforded the same opportunity to speak on and moderate panels and participate in podcasts.

Cost is \$30,000 (no taxes) per calendar year (no proration) in addition to annual membership dues.

Package valued at \$40,000



Gold Partners are next in line (after our Platinum Partner) for spots at all of our in-person events in 2024 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees, but can be as few as 100 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 300 corporate entities. Gold Partners have a guaranteed three passes per chosen conference (non-transferrable between conferences).

CAASA 2024 PLATINUM PARTNER

Our 2024 Platinum Partner package is meant for those who wish to get the most exposure possible from our audience. Not only will our Platinum Partner be featured prominently at all of our conferences, but will be highlighted independently on our website, and wherever a CAASA banner is present (globally!).

Our Platinum Partner will receive everything included for our Gold Partners plus:



- Sponsorship and up to 3 passes for all CAASA Conferences
- Includes a Title Sponsor at a conference of their choosing & \$5,000 discount on any additional Title Sponsorships
- Dedicated hero banner on our website (priceless)
- Includes Sponsorship and a Foursome at CAASA Golf Day
- Individual banner with only your logo at all in-person events, both within Canada & globally
- Booth at all in-person conferences (\$14,000 value)

As is our tradition, we treat all members equally for our speaking opportunities and our Platinum Partner is afforded the same opportunity to speak on and moderate panels and participate in podcasts.

Cost is \$50,000 (no taxes) per calendar year (no proration) in addition to annual membership dues.

Package valued at \$90,000



Our Platinum Partner is first in line for spots at all of our in-person events in 2024 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees, but can be as few as 100 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 300 corporate entities. Our Platinum Partner has a guaranteed three passes per chosen conference (non-transferrable between conferences).

SPONSORSHIP LEVELS

MEMBERS ASK - WE DELIVER

We strive to deliver the most compelling conferences & events, inspired by your feedback.

Elevate your event experience, and join us in 2024 as we unveil a new range of sponsorship opportunities, tailored to meet our members' needs and provide the exposure levels they are seeking.



2024 Platinum Sponsor

Offers your company the highest level of visibility and be exclusively showcased at each CAASA event we host in 2024. In addition to all the benefits featured in the Gold Sponsor package, our Platinum Sponsor receives an exhibit booth (valued at \$2,000), has a first call on all additional and enhanced sponsor items (see page 16 & 17 respectively) at each of their chosen conferences, and has a comp opportunity to be Title Sponsor at one of our 2024 events.

Conference Title Sponsor

Each CAASA conference, summit and forum will feature a single Title Sponsor. Title Sponsors receive all the benefits from the Gold Sponsor package, plus recognition as program sponsor, having their logo showcased on the program front cover along with a full-page advertisement on the back cover. Additionally, a two-page spread inside the program, and excellent visibility to all attendees as the conference messaging & meeting app sponsor. As the app sponsor, your corporate logo will be displayed on the splash screen every time a user accesses the platform (mobile and desktop), and on each email sent to delegates via the app. Title Sponsors also receive second call on additional and enhanced sponsor items (see page 16 & 17 respectively).

2024 Gold Sponsors

2024 Gold Sponsors will be highlighted together at every conference and event, CAASA hosts in 2024. In addition to the benefits offered through a Silver Sponsorship package, members of this level will receive third call on all enhanced sponsor items (see page 16 & 17 respectively), along with a full-page advertisement in the relevant conference program. Gold Sponsors will also be provided a discounted price to be a Title Sponsor for the conference, if available.

Conference Silver Sponsor

In addition to benefits featured in the Bronze Sponsor package, Silver Sponsors will also be entitled to a Table Talk session. During CAASA conferences, summits, and forums, sponsors of this exclusive package will be provided the opportunity to host two (2) 25-minute roundtable discussions.

Conference Bronze Sponsor

Sponsors of this package will be provide a ½-page advertisement in the printed conference program; logo placement on the event page, all marketing collaterals and at the conference venue; complimentary sponsor item and be provided the opportunity to purchase enhanced sponsor items (see page 16 & 17 respectively).

SPONSORSHIP LEVELS

Complimentary Booth at all CAASA conferences attended					✓
Plantinum Sponsor banner at all 2024 CAASA event					✓
Gold Sponsor banner at all 2024 CAASA event			✓		
One Complimentary Title Sponsorship					✓
Discounted Title Sponsorship			25 - 50% Disc		25-50% Disc
Program Sponsor with logo on front cover and full page advertisement on back cover				✓	
Two Page Spread Advertisement				✓	
Additional Full Page Advertisement	\$1,000	\$1,000	✓		✓
Table Talk - Host Two 25 minute sessions		✓	✓	✓	✓
Opportunity to purchase enhanced sponsor items (page 17)	✓	✓	✓	✓	✓
Complimentary additional sponsor item (page 16)	✓	✓	✓	✓	✓
Logo placement on the event page, marketing emails, and at the conference venue	✓	✓	✓	✓	✓
1/2 page advertisement in the printed conference program	✓	✓	✓	✓	✓
	Bronze	Silver	2024 Gold	Title	2024 Platinum

WEALTH MANAGERS' FORUMS

MARCH 5TH, 2024 (TORONTO) & MARCH 7TH, 2024 (MONTREAL)

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.

	Pricing	
Bronze Sponsor	\$2,000 per City \$3,500 for both Cities	<p>Service Providers 12%</p> <p>Investors 41%</p> <p>Asset Managers 47%</p> <p>Wealth Managers 29%</p> <p>SFOs 4%</p> <p>MFOs 8%</p>
Silver Sponsor	\$3,000 per City \$5,000 for both Cities	
Title Sponsor	\$10,000 both Cities \$5,000 for 2024 Gold Sponsors Complimentary for 2024 Platinum Sponsor	

DELEGATE REGISTRATION FEES

Investors	Complimentary
Members of CAASA Asset Manager & Service Providers	\$1,000 per city

Investor means Investment Advisors, Single Family Offices, and Multi-Family Offices.

[View 2023 Program](#)

[YYZ Event Page](#)

[YUL Event Page](#)

Amundi
ASSET MANAGEMENT

iCapital

GROUP RMC

CMLS Financial
Fast, Friendly, Forward.

BLUE OWL

ICM
Asset Management



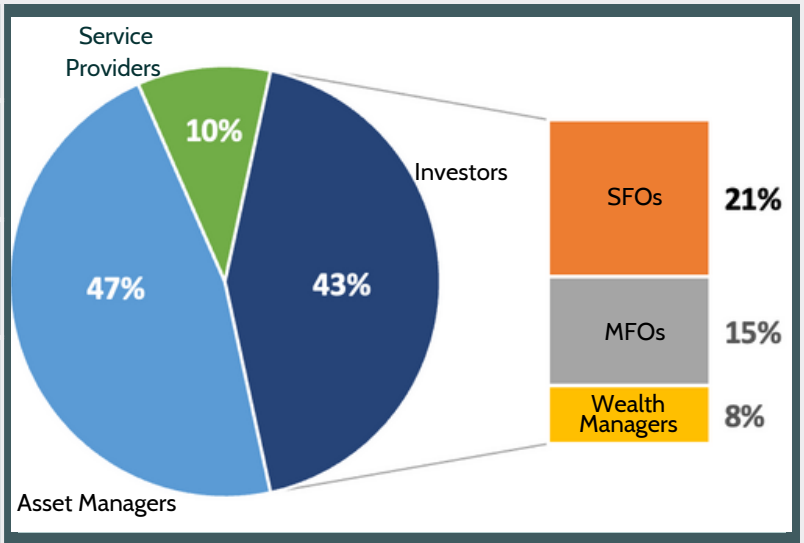
Thank you to our
past Sponsors

FAMILY OFFICE SUMMIT

APRIL 9-10, 2024 - TORONTO

THE FAMILY OFFICE SUMMIT IS A CONFERENCE DESIGNED TO BRING IN SINGLE FAMILY OFFICES AND MULTI-FAMILY OFFICES, WHERE WE COVER AN ARRAY OF ALTERNATIVE STRATEGIES AND TOPICS SPECIFICALLY TAILORED FOR THE FAMILIES.

	Pricing
Bronze Sponsor	\$3,000
Silver Sponsor	\$5,000
Title Sponsor	\$20,000 \$15,000 for 2024 Gold Sponsors Complimentary for 2024 Platinum Sponsor



DELEGATE REGISTRATION FEES

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

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, investment advisor and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate category. Core service providers include prime brokers, fund administrators, accounting and legal firms.

[View 2023 Program](#)

[View 2023 Event Page](#)

[View 2024 Event Page](#)



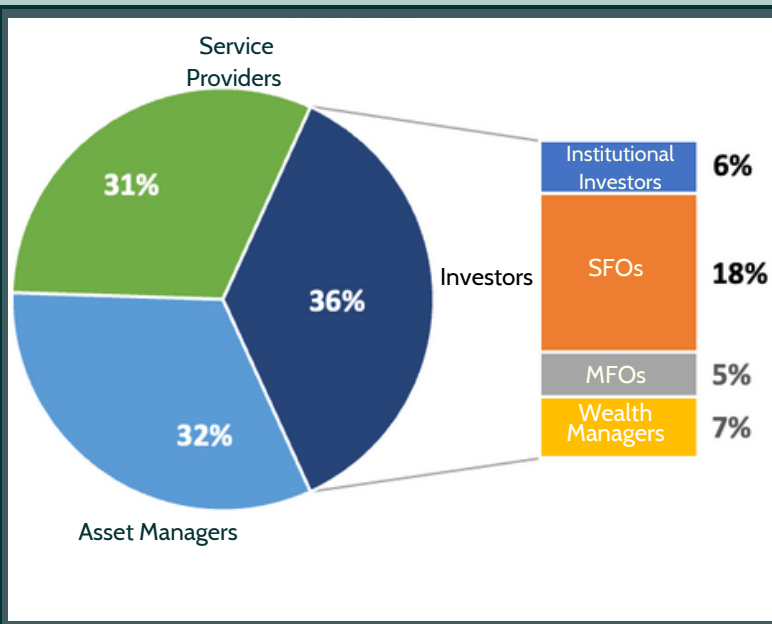
Thank you to our
past Sponsors

PRIVATE EQUITY & VENTURE CAPITAL ASSEMBLY

JUNE 2024, TORONTO

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.

	Pricing
Bronze Sponsor	\$2,000
Silver Sponsor	\$3,000
Title Sponsor	\$10,000 \$5,000 for 2024 Gold Sponsors Complimentary for 2024 Platinum Sponsor



DELEGATE REGISTRATION FEES

Investors	Complimentary
Members of CAASA Asset Manager & Service Providers	\$1,000 per delegate

Investor means Investment Advisors, Single Family Offices, Multi-Family Offices and Institutional Investors.

[View 2022 Program](#)

[View 2023 Event Page](#)

[View 2024 Event Page](#)



VALOUR



Family Office



TECH CAYMAN



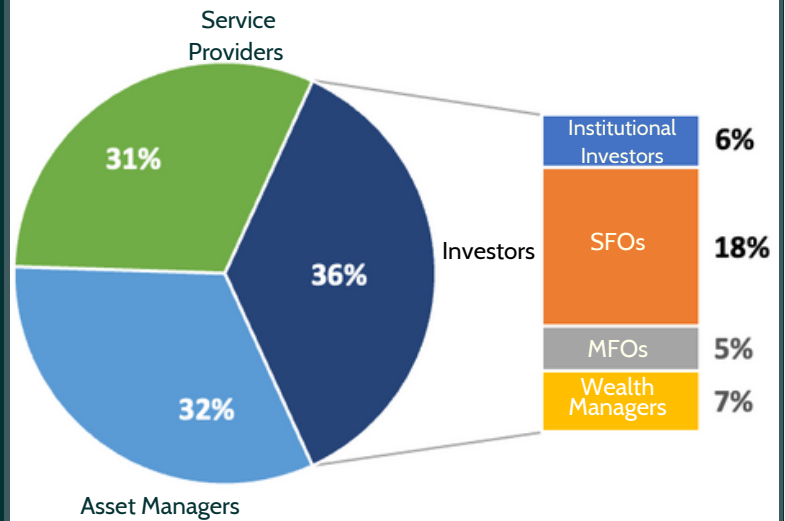
Thank you to our past Sponsors

DIGITAL ASSETS & BLOCKCHAIN DAY

JUNE 2024, TORONTO

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.

	Pricing
Bronze Sponsor	\$2,000
Silver Sponsor	\$3,000
Title Sponsor	\$10,000 \$5,000 for 2024 Gold Sponsors Complimentary for 2024 Platinum Sponsor



DELEGATE REGISTRATION FEES

Investors	Complimentary
<u>Members of CAASA</u> Asset Manager & Service Providers	\$1,000 per delegate

Investor means Investment Advisors, Single Family Offices, and Multi-Family Offices.

[View 2022 Program](#)

[View 2023 Event Page](#)

[View 2024 Event Page](#)



Thank you to our
past Sponsors

REAL ASSETS & PRIVATE LENDING FOCUS

SEPTEMBER 2024, TORONTO

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.

	Pricing
Bronze Sponsor	\$2,000
Silver Sponsor	\$3,000
Title Sponsor	\$10,000 \$5,000 for 2024 Gold Sponsors Complimentary for 2024 Platinum Sponsor

CAASA is proud to
offer this new
conference in
2024!

DELEGATE REGISTRATION FEES

Investor

Members of CAASA
Asset Manager & Service Providers

Complimentary

\$1,000 per delegate

Investor means Investment Advisors, Single Family Offices, and Multi-Family Offices.

[View 2024 Event Page](#)

Special Thanks to our 2023 Signature Partners

Amundi
ASSET MANAGEMENT

CIBC MELLON

GROUP RMC

PREQIN


HEDGEFACTS
OUTSOURCED OPERATIONS SOLUTIONS

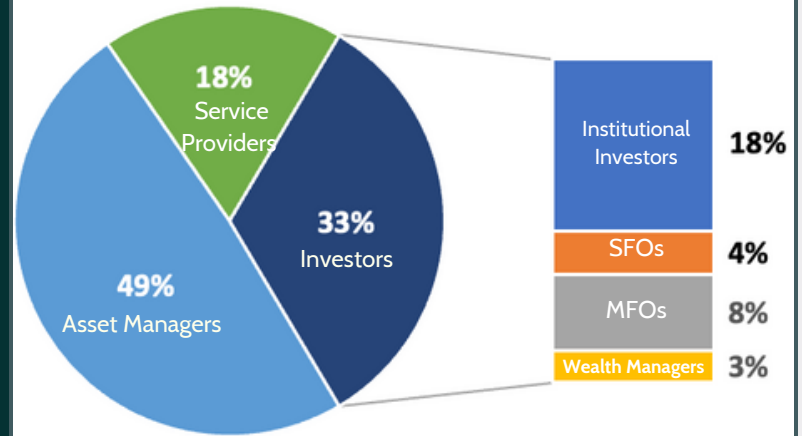
 ROMSPEN

CAASA ANNUAL CONFERENCE

NOVEMBER, 2024 - MONTREAL

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

	Pricing
Bronze Sponsor	\$3,000
Silver Sponsor	\$5,000
Title Sponsor	\$20,000 \$15,000 for 2024 Gold Sponsors Complimentary for 2024 Platinum Sponsor



DELEGATE REGISTRATION FEES

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

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, investment advisor and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate category. Core service providers include prime brokers, fund administrators, accounting and legal firms.

[View 2022 Program](#)

[View 2022 Event Page](#)

[View 2023 Event Page](#)

avenueliving
asset management

Amundi
ASSET MANAGEMENT

coinbase

Fidelity
INVESTMENTS

MGG
INVESTMENT GROUP

RISE
PROPERTIES

PREQIN

SGGG
FUND SERVICES INC.

AEOLUS
CAPITAL MANAGEMENT

H.I.G.
CAPITAL

AXONIC

CIBC MELLON

METORI
Capital Management

HEDGEFACTS

PLUS PLUS
capital management

ATIMCO



Thank you to our
past Sponsors

COMPLIANCE & OPERATIONS DIALOGUE

NOVEMBER 2024, TORONTO

THIS HALF-DAY SESSION IS DESIGNED FOR OPERATIONS & COMPLIANCE PROFESSIONALS AT ASSET MANAGERS, WEALTH MANAGERS, AND OTHER REGISTRANTS IN CANADA

	Pricing
Sponsor (Service Providers)	\$2,000

As a sponsor, you will have the opportunity to host a 45 minute dialogue and receive two complimentary passes. Member managers invited to the panel receive comp passes as thanks.

DELEGATE REGISTRATION FEES

Investor (e.g., Pension, Family Office)

Complimentary

Members of CAASA
Asset Manager

\$100

Non - Members of CAASA
Asset Manager

\$500

Members of CAASA
Service Providers

\$500

This half-day session is designed for operations & compliance professionals at asset managers, wealth managers, and other registrants in Canada (and happy to have those from elsewhere!). We designed the day to be full of high-quality content that is relevant to the audience and delivered as an educational session. These sessions are presented by our members as a series of concurrent Table Talks and is offered to CAASA member companies as well as non-members (as attendees, subject to capacity constraints).

[View 2023 Event Page](#)

[View 2024 Event Page](#)

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):



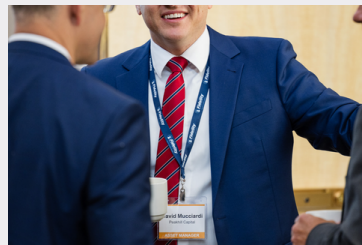
- Morning Run/Yoga/Exercise
 - Breakfast
 - Morning Break
 - Lunch
 - Afternoon Break
- Evening Reception (may include wine-tasting or the like)
 - Tête-à-tête meeting times (usually 1 per day)
- Lanyards (provided and delivered by the member)
- Portable phone chargers

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 (provided by sponsor)



Phone Chargers (stickers provided by sponsor)



Evening Reception



Tête-à-têtes

And More....

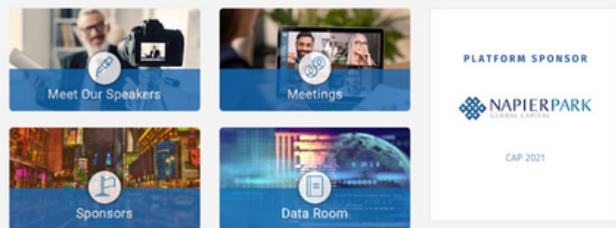
ENHANCED SPONSOR EXPOSURE ITEMS

A Plethora of Sponsorship Opportunities



These exposure items are purchased on a first-come basis to members as they commit to sponsoring the event. Platinum Sponsors have first call on any remaining item from when they commit to that level of sponsorship and Gold Sponsors have next call on any remaining item once Platinum Sponsors have had their turn. (Gold Sponsors 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 they committed to the conference.

- **Hotel keycards (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
- **Espresso coffee bar & barista (including logo placement on froth):** TBD; likely \$3,000
- **Others as they present themselves...**



**Meeting Platform
(\$3,000)**



Program (\$1,500)



**Hotel key cards
(\$1,500+)**



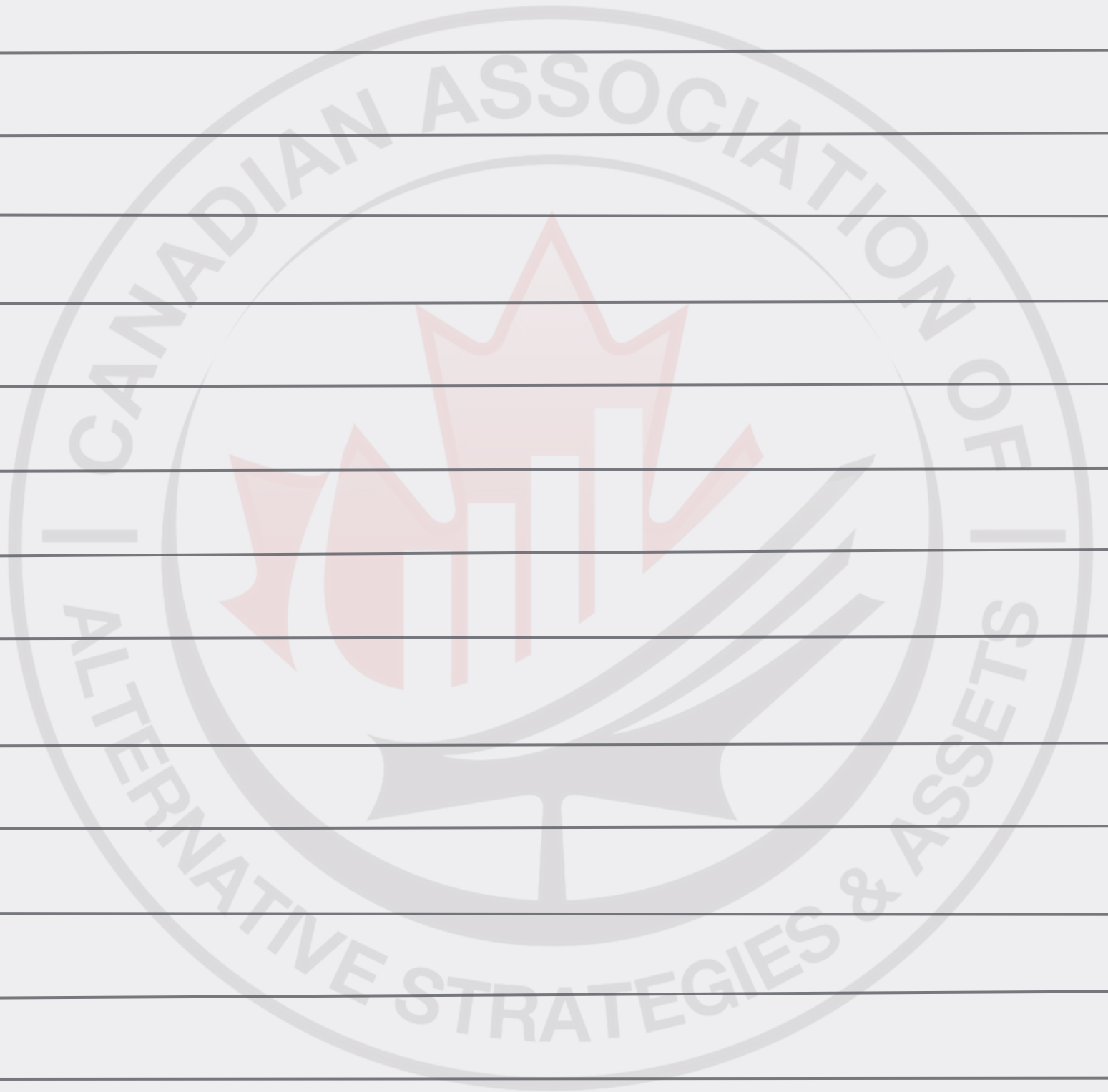
**Booth
(\$2,000)**



**Fancy Coffee
(~\$3,000)**

And More....

NOTES



CAASA SOCIALS

Sponsorship is \$2,000 or \$15,000 for all 2024 Socials

Founding Day Drinks:
Toronto & Montréal - February 2024

Summer Socials:
Toronto - July, August, &
September

Holiday Social:
Toronto & Montréal - December 2024

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 2023 Summer Social Event Page](#)

Thank You to our 2023 Social Sponsors



Special Thanks to our 2023 Signature Partners



CAASA Charity Golf Tournament

Range of Sponsorship Opportunities \$500 - \$5,000

Location TBD!

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	\$2,000

[View 2023 Event Page](#)

[View 2024 Event Page](#)

Experience the RBC Canadian Open

JUNE 1, 2024



Title Sponsor - \$10,000 & Ticket Packages from \$300pp



The Colt Club

Colt Club includes: Views of 17th green & The Rink (hole 13), Private hosting area and shared outdoor viewing spaces, Food & Beverages, Reserved washrooms facilities and Televisions with the championship broadcast.

The Rink – With authentic hockey boards from tee to green, the 13th hole will be transformed into #TheRink, the embodiment of Canadiana. Spectators bang the boards and do the wave, players wear their favourite hockey team jerseys, volunteers dress as referees and celebrities from the world of sport and entertainment join in on the fun as well! #TheRink is a must see area that has become a hallmark feature of the RBC Canadian Open.

To cap the evening there is a Saturday night concert hosted by RBC and in partnership with Live Nation Canada and Golf Canada, the RBCxMusic Concert Series has seen unforgettable performances from the likes of Maroon 5, Florida Georgia Line, Flo Rida, and The Glorious Sons.



Registration Fees (Pricing guaranteed for first 100 tickets)

Platinum Partner Tickets	First comp - Additional \$400	CAASA Member 4 Tickets	\$1,800
Gold Partner Tickets	\$400	CAASA Member 10 Tickets	\$4,000
CAASA Member Tickets	\$500	CAASA Member 20 Tickets	\$6,000

Title Sponsor (unique) - \$10,000

As the sole sponsor of the event, the sponsor receives 20 passes to the open. Additionally, logo will be placed on all marketing materials created by CAASA. As well as the opportunity to display a banner at the open and ability to provide swag material (ex. logo branded water bottles). CAASA will work closely with the sponsor to provide additional benefits as the date approaches..

[View 2024 Event Page](#)

THE
RINK



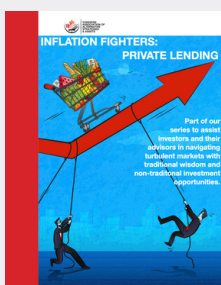
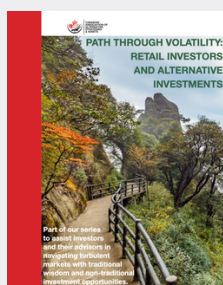
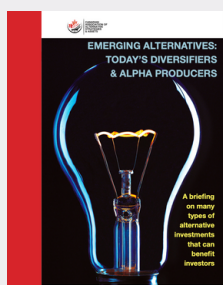
CAASA PAPERS / PRIMERS

\$3,000



As you might recall – and possibly participated in – we have produced numerous CAASA Primers over the last 5 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. Recent ones have been more thematic, which has allowed a more expansive narrative.

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 5-10 annual conferences + the 30+ that CAASA staff attend (and/or speak at) globally each year.



CAASA MEMBER DIRECTORY



Sponsorship Opportunities

Full Page Advertisement

\$1,000

**Directory Sponsor
Cover Page Logo and Full
Back Cover Advertisement**

\$5,000

As you are likely aware, CAASA prints and distributes a program for each conference, complete with the agenda, speakers, sponsor advertisements and, until now, our member directory.

With our organizing two flagship conferences and seven one-day conferences each year, the membership directory is constantly changing (new members every week!), and the environmental impact of additional pages dedicated to the member directory for every conference, we decided to split the document.

Our conference programs will be supplemented by our bi-annual Member Directory: as of the end of March, before the Family Office Summit, and the end of October, before the CAASA Annual Conference.

All members will be displayed in the directory and this also brings an opportunity to those who want a larger presence and promote their offering for our members and the public with the option to have a full page advertisement or be the directory sponsor!

Special Thanks to our 2023 Signature Partners

Amundi
ASSET MANAGEMENT

CIBC MELLON

GROUP RMC

PREQIN


HEDGEFACTS
OUTSOURCED OPERATIONS SOLUTIONS

 ROMSPEN

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, CFA
Partner
paul@caasa.ca
(647) 953-0737 ext. 1

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