



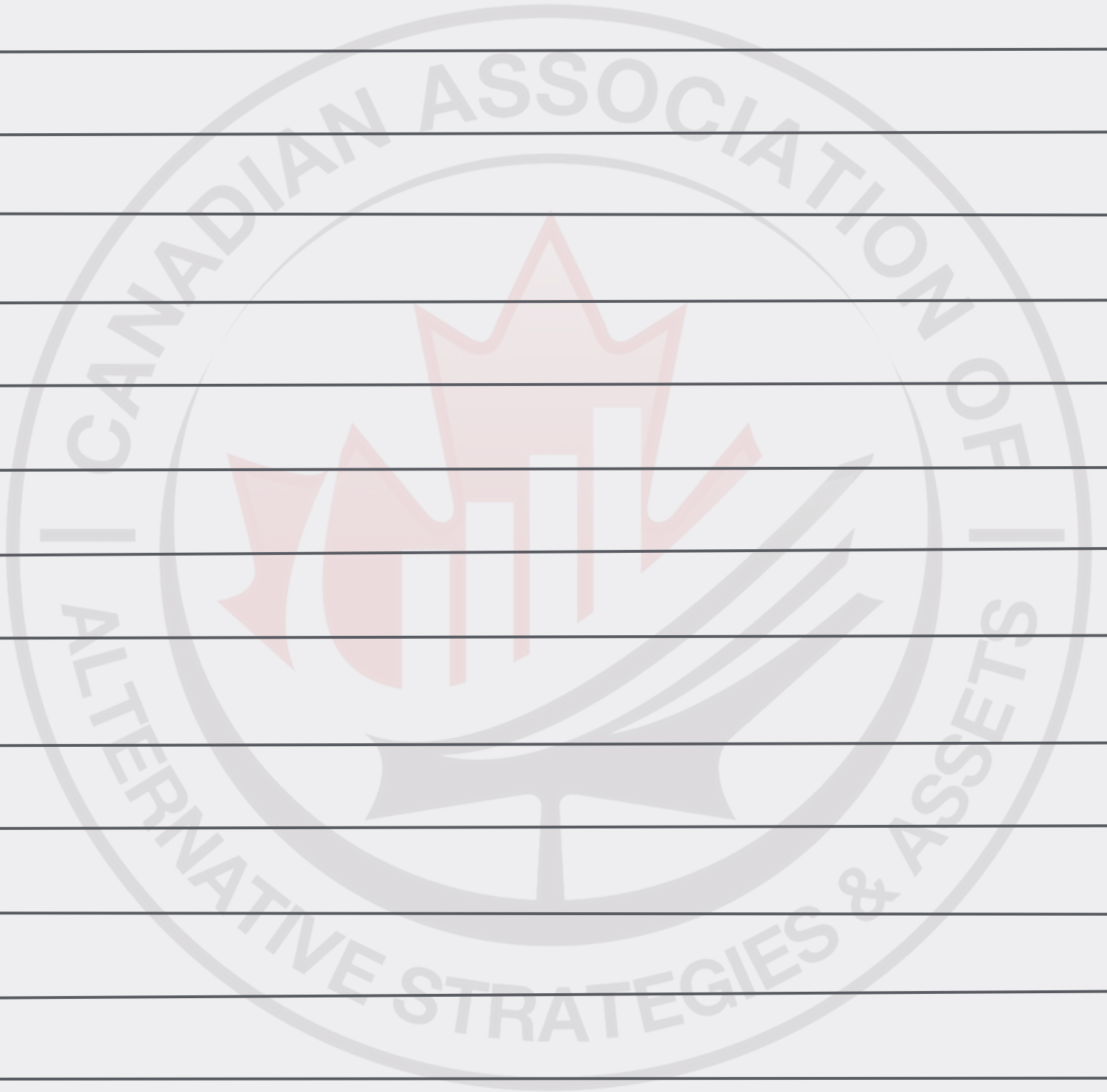
# CAASA'S 2024 PLANNING DOCUMENT

**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

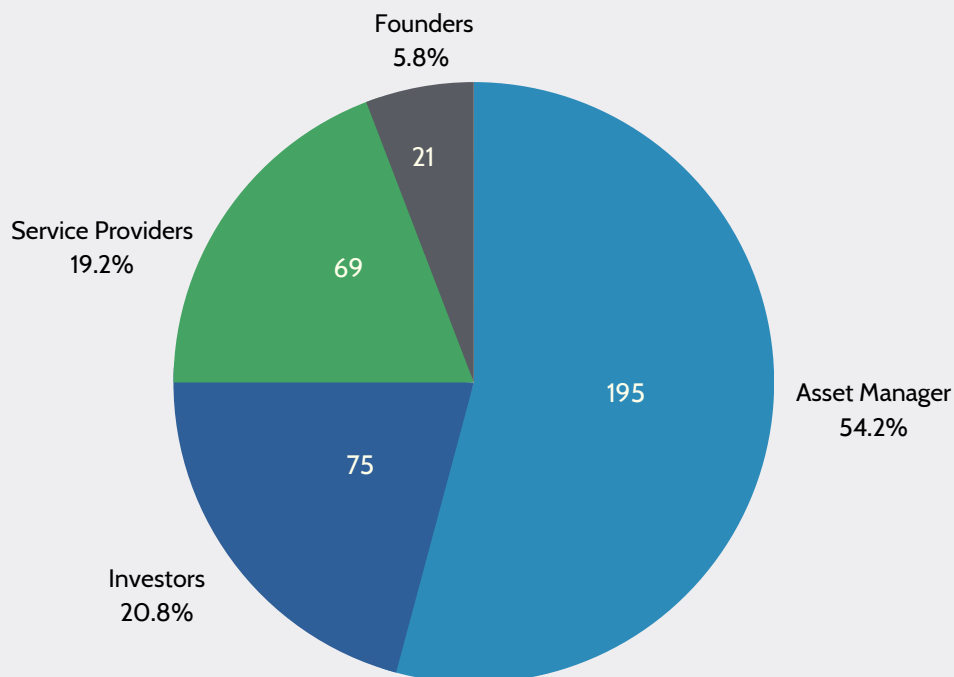
Over the last year we have exceeded our expectations for membership growth, which actually now stands at 360 members and with a fairly steady composition of ~20% investors, ~50% managers from all types of shops running many diverse alternative assets & strategies, and ~20% service providers - plus 21 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 9-10, 2024** **\$3,000+** [Page 10](#)

Toronto

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

### CAASA Annual Conference **November 12-13, 2024** **\$3,000+** [Page 12](#)

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 5 & 26, 2024** **\$2,000+ per city** [Page 9](#)

Montreal & Toronto

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

### CAASA Alternative Perspectives: Private Market Focus **September 24 -25, 2024** **\$2,000+** [Page 11](#)

Toronto

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

## Social Sponsorships

### Fall, Summer & Winter Networking Nights **\$1,000 to sponsor per event** [Page 16](#)

Toronto, Montreal

## Other Opportunities

### Papers / Primers **\$3,000** [Page 17](#) Membership Directory **\$1,000 +** [Page 17](#)

## Give-Aways



MSC Cruises

December 2023 - July 2024

[Page 18](#)



# 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 (Toronto & Montréal - March 5 & 7, 2024)
  - Family Office Summit (Toronto - April 9-10, 2024)
  - CAASA Alternative Perspectives: Private Market Focus (Toronto - September 24-25, 2024)
  - CAASA Annual Conference (Montréal - November 12-13, 2024) [Flagship]
- \$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).

**Special Thanks to our 2024 Gold Partners**



# 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

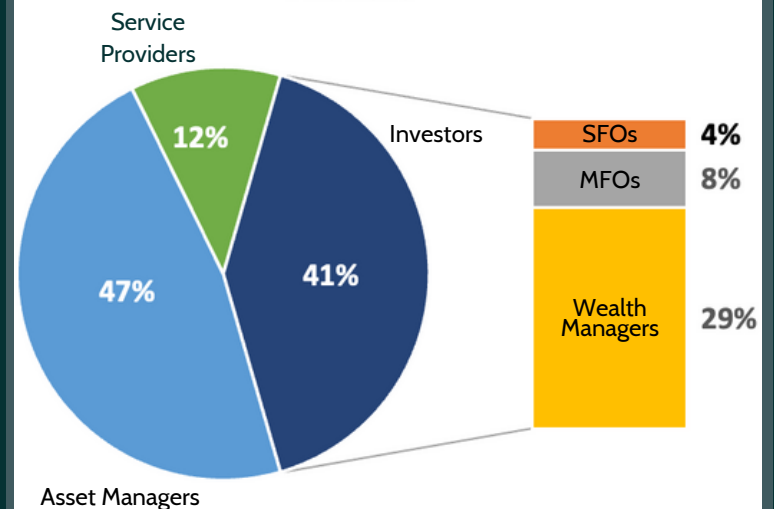
Complimentary Booth at all CAASA conferences attended					
Plantinum Sponsor banner at all 2024 CAASA event					
Gold Sponsor banner at all 2024 CAASA event					
One Complimentary Title Sponsorship					
Discounted Title Sponsorship			25 - 50% Disc		25-50% Disc
Program Sponsor with logo on front cover 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 26TH, 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
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](#)



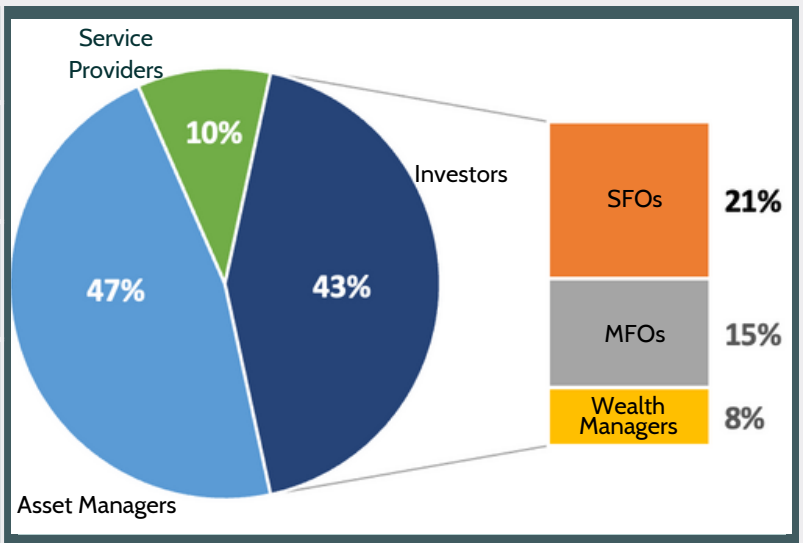
Thank you to our  
past Sponsors

# FAMILY OFFICE SUMMIT

APRIL 9TH-10TH, 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](#)

GROUP RMC

Amundi  
ASSET MANAGEMENT

CIBC MELLON

PREQIN

ROMSPEN

Fidelity  
INVESTMENTS

BMO  
Global Asset Management



DART

Family  
Office

INVICO

WEALHOUSE  
CAPITAL MANAGEMENT

ETHER CAPITAL

Sage Triovest

3iQ  
DIGITAL ASSET MANAGEMENT

Capitalize  
for KIDS

HGC INVESTMENT MANAGEMENT INC.

Firm  
Capital

POLYMATH

Invesco

Kayne Anderson  
Capital Advisors, L.P.

unison  
Investment Management

MGG  
INVESTMENT GROUP

Thank you to our  
past Sponsors

# CAASA ALTERNATIVE PERSPECTIVES: PRIVATE MARKET FOCUS

SEPTEMBER 24TH-25TH, 2024, TORONTO

JOIN US, DOZENS OF SPEAKERS, INVESTORS, ASSET MANAGERS, AND SERVICE PROVIDERS ACTIVE IN THE PRIVATE MARKETS SPACE: REAL ESTATE, INFRASTRUCTURE, PRIVATE EQUITY, VENTURE CAPITAL, AND PRIVATE/ALTERNATIVE LENDING

	Pricing
Bronze Sponsor	\$2,000
Silver Sponsor	\$3,500
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

Complimentary

Members of CAASA  
Asset Manager & Service Providers

\$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**  
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**PREQIN**

  
**HEDGEFACTS**  
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 **ROMSPEN**

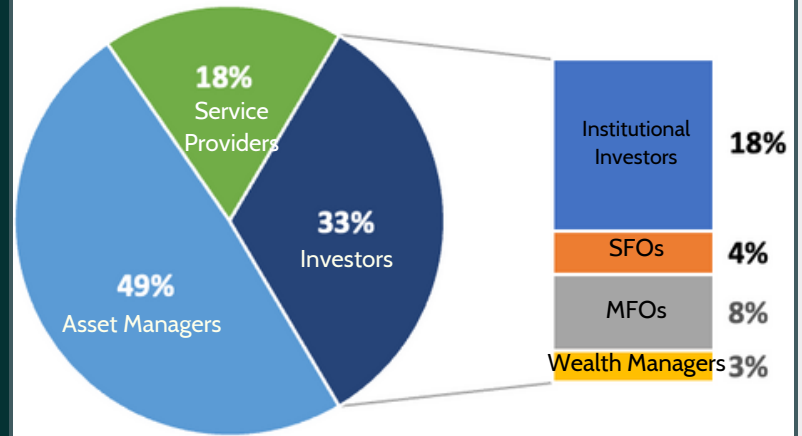


# CAASA ANNUAL CONFERENCE

NOVEMBER 12TH-13TH, 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](#)



Thank you to our  
past Sponsors

# 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):



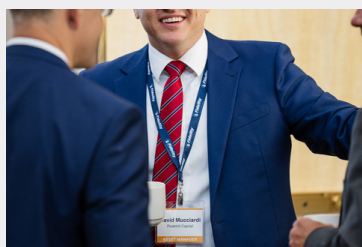
- Morning Run/Yoga/Exercise
- Breakfast
- Morning Break
- Lunch
- Afternoon Break
- Evening Reception (may include wine-tasting or the like)
- Tête-à-tête meeting times (usually 1 per day)
- Lanyards (provided and delivered by the member)
- Portable phone chargers

These exposure items are apportioned on a first-come basis to members as they commit to sponsoring the event. 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 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....**

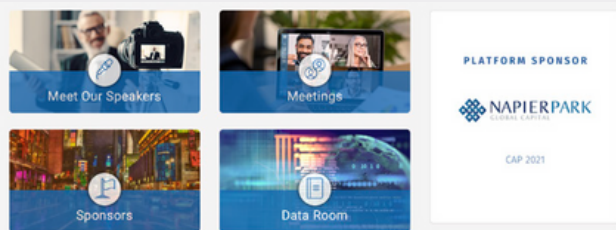
# ENHANCED SPONSOR EXPOSURE ITEMS

## 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+)**



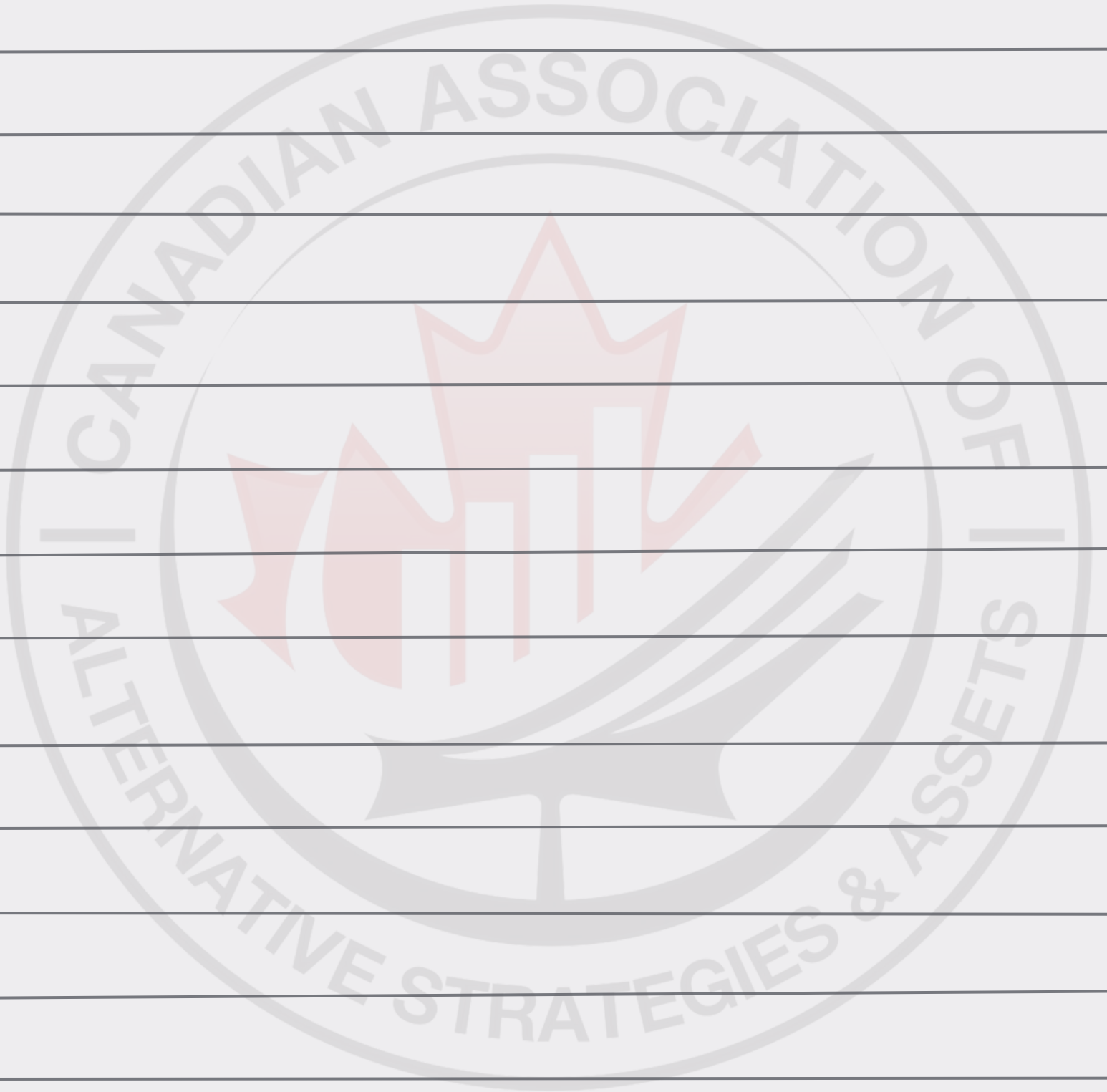
**Booth  
(\$2,000)**



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

**And More....**

# NOTES





# CAASA NETWORKING NIGHTS

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

Networking Nights:  
Toronto - Feb., May, July, Sept.,

Holiday Networking Night:  
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





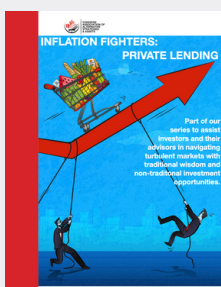
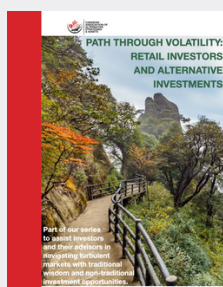
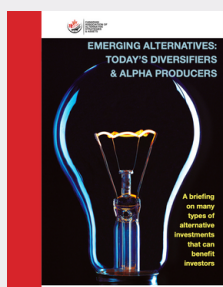
## CAASA PAPERS / PRIMERS

\$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**

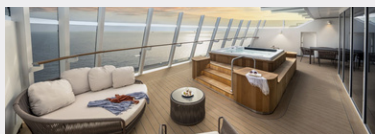
**\$5,000**

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!



## MSC CRUISES GET-AWAY GIVE-AWAY

We are happy to partner with MSC Cruises for a super prize to be awarded to one of our event attendees (must attend and complete a ballot to be eligible) for the following events:

- CAIA & CAASA Montréal Social – Dec 5, 2023
- CAASA Member Toronto Social – Dec 7, 2023
- February Networking Night 2024 – Feb 28, 2024
- Wealth Managers' Forum Toronto – March 5, 2024
- Wealth Managers' Forum Montréal – TBC
- Family Office Summit (Toronto) – April 9-10, 2024
- May Networking Night 2024 – May 15, 2024
- July Networking Night 2024 – July 17, 2024 - **DRAW DATE**
- 

Plus others as might be added throughout this period.



## ABOUT THE AWARD



The prize is a spectacular MSC Cruises 7-night Caribbean sailing for two in a prestigious Yacht Club cabin\*. Prepare to be pampered onboard in the elite Yacht Club with a 24-hour Butler Service, Premium Drink Service, Spa inclusions plus much more! An MSC Cruises Representative will be joining at each event to share all things MSC and the details of the fabulous prize offering.

\*Subject to travel restrictions, all details provided to the lucky winner upon receipt

This optional opportunity is conducted by MSC Cruises and your information will be shared with MSC Cruises for purposes as detailed on the ballot as a term/condition of entering the contest.

[Learn More](#)

[View MSC Cruises' Website](#)



## 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:

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James Burron, CAIA  
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