

Wealth Managers' Forums 2024

Presented by: The Canadian Association of Alternative Strategies & Assets



CANADIAN
ASSOCIATION OF
ALTERNATIVE
STRATEGIES
& ASSETS

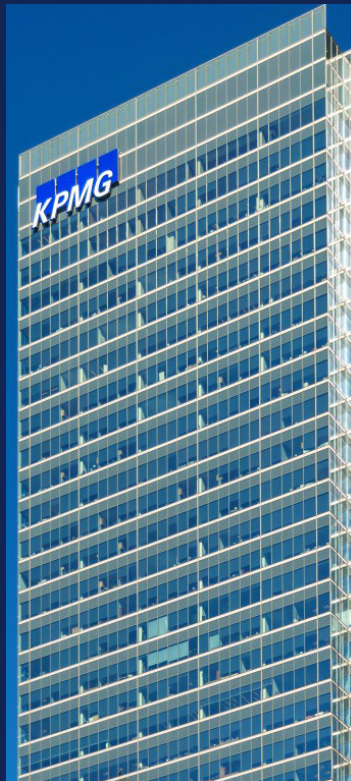
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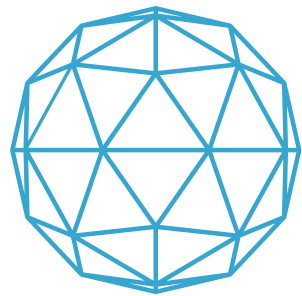


Asset
Management
One

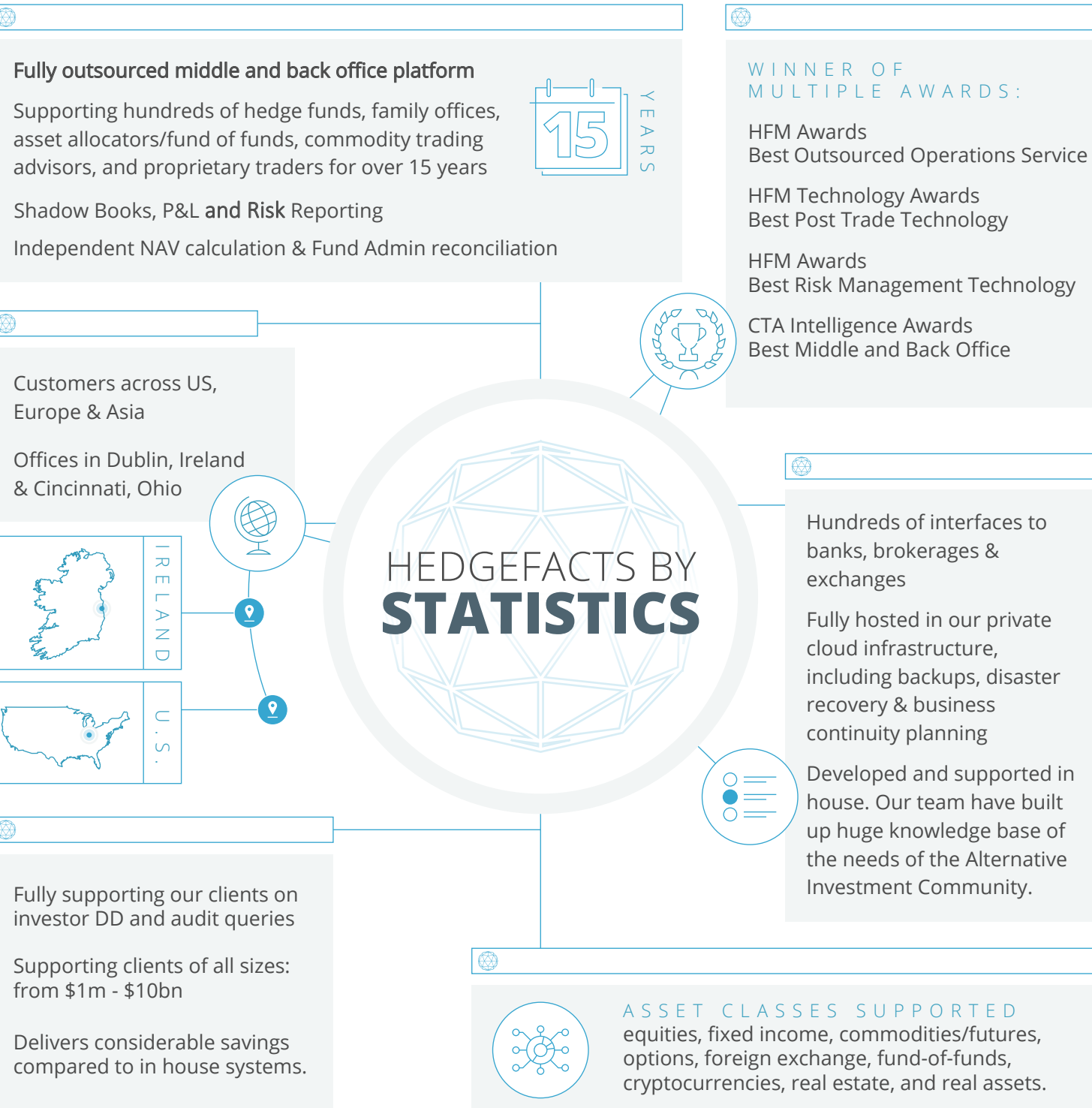
Toronto
Tuesday, March 5th

Montréal
Tuesday, March 26th





HEDGEFACTS



YOUR SOURCE FOR ALL THINGS ALTERNATIVE

Welcome to our conference series focused on the requirements and preferences of retail, HNW, and UHNW Investment Advisors and allocators. We specially designed each city's program to reflect their particular preferences and have (what we believe to be) a balance of talks from seasoned Investment Advisors and asset managers. Our format reflects the high value you put on your time – we start at about lunch time and end with a reception – and appreciate your taking time to attend the session in your city. We also have small group discussions (Table Talks) where you can delve in to particular topics and query the presenters. We also have our CAASA CE Centre at your disposal which will have 70+ of our webinars and podcasts from 2021 ported over as well as a course from each of our conference sponsors, and a selection of our panels and presentations.

THANK YOU TO OUR SPONSORS



the proven alternative

Powering the world's alternative
investment marketplace

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ABOUT CAASA

INCLUSIVE, ACTIVE, AND 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: 33 events in 2018 and at least 50 planned in 2019 (15 in the first 2 months alone). **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 / cryptoassets, 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.

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. CAASA is not a capital introduction platform, but we do create forums where investors and managers can meet organically or via structured meeting sessions 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.

Founders participate in our Founders' Pitch Competitions as well as other initiatives created to propel their fledgling businesses forward.

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 large alternatives focus, 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. Talent in investment management (approximately 10% of all CFA charterholders reside in Canada) as well as newer areas such as digital assets and robo-advisory services are a differentiator. Of course, Canadian investors and managers are keen to learn of best practices in operations and portfolio management from their global peers.

WHY JOIN?

As mentioned, we have attracted 330+ members over the last 4 years or so and the reasons are plentiful and varied. Whether an investor, manager, or service provider, some seek a group of like-minded individuals in the alts space to connect with on an on-going and (semi-)structured basis; others have a more commercial interest in that they are intent upon being aware of the newest trends in the industry and (providing they have one) presenting their knowledge to an audience of peers; and others have made their mark (or are on their way to doing so) and really just want to give back to a group of people that has done a great deal for them.

Whatever your motivation, if you're not in membership yet we'd love to hear from you!

ETF exposures
with **experience**
you can trust.



Put our experience to work. BMO offers many of the largest ETFs in Canada, covering a range of solutions—from broad U.S. equity to fixed income.

Exchange Traded Funds

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Commissions, management fees and expenses all may be associated with investments in exchange traded funds. Please read the ETF Facts or prospectus of the BMO ETFs before investing. Exchange traded funds are not guaranteed, their values change frequently and past performance may not be repeated. For a summary of the risks of an investment in the BMO ETFs, please see the specific risks set out in the BMO ETF's prospectus. BMO ETFs trade like stocks, fluctuate in market value and may trade at a discount to their net asset value, which may increase the risk of loss. Distributions are not guaranteed and are subject to change and/or elimination. BMO ETFs are managed by BMO Asset Management Inc., which is an investment fund manager and a portfolio manager, and a separate legal entity from Bank of Montreal. ©/™ Registered trademarks/trademark of Bank of Montreal, used under licence.

CLIFTON BLAKE

Toronto Real Estate paying
monthly distributions like clockwork

MORTGAGE INCOME FUND

- ⊕ **STABLE, PREDICTABLE YIELD** secured by Ontario Real Estate
- ⊕ **9.45% YTD ANNUALIZED RETURN** (9.87% with DRIP)

PRIVATE REAL ESTATE TRUST

- ⊕ A collection of **PRIME TORONTO REAL ESTATE ASSETS**
- ⊕ **12-14% TOTAL ANNUAL RETURNS** with 7% yield (dist. monthly from rents)

1113
YONGE
STREET



1027
YONGE
STREET



1934-1938
BLOOR
STREET W.



871-899
COLLEGE
STREET



1886-1928
EGLINTON
AVENUE W.



1875-1901
EGLINTON
AVE W.



2946-2968
DUNDAS
STREET W.



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MANY FORMS OF CONTENT

TÊTE-À-TÊTE MEETINGS

This is your opportunity to schedule one-on-one meetings with any conference delegate. Feel free to use our online platform to connect with any of our delegates in any of the cities - everyone is on it and open to network. We do not have any set-aside meeting times, but we're certain that folks can schedule a time to meet quite easily - whether in-person around the conference day or otherwise.

Anyone can book a meeting with any other delegate. Please decline meetings that you might not be interested in or able to commit too - then the other party can invite another to chat. And if you are interested, you're free to connect via our messenger or ask for their email (we DO NOT release delegate contact information, so you'll have to ask for it or send yours along to them and await a response).

TABLE TALKS

We do not sell paid-for speaking spots, preferring delegates to choose when they might like to hear from sponsors. Table Talks are 30-minute sessions where anywhere from 2 to 12 delegates can get a briefing on a topic and participate in an interactive discussion. As with all of our events, we refrain from pay-to-play and draw all speakers from membership and prefer audiences to opt-in to more niche discussions, as will be delivered at the Table Talks.

CAASA CE CENTRE - COURSES ON ALL THINGS ALTERNATIVE

We believe in making alternatives as accessible as possible and developed our CE Centre with that in mind! Launched in early 2021, we partnered with **Learnedly** to create a platform for IROC Investment Advisors (and many others, as described below) to gain unbiased knowledge across all alternative strategies and asset classes. Of course, true to our mantra of access, **registration on and use of this platform by advisors is 100% free and without any additional charge, ever. And, of course, we will never sell your information to anyone.**



To date, we have released more than 60 courses including sessions from our *Wealth Managers' Forum 2021* and *Digital Assets Global Exchange 2021* and (soon) discussions from our *Private Equity & Venture Capital Assembly 2021*. We also transferred many of our webinars (all of them to be added by end of January 2022) on topics such as: India, China, Colombia, growth stocks, alt-alts, real estate, private lending & mortgage funds, quant investing, the effects of COVID on certain markets, KYP & compliance, cryptoassets/currencies, ESG, the metaverse, inflation, foreign exchange, and more!

We offer CE credits available from the **Financial Planning Institute** and the **Mutual Fund Dealers Association**. We are adding eligibility for both **CFA** and **CPA** members and given that our courses are content-rich, provide real insights vs. marketing pitches, and the skill-testing questions are written by an experienced individual in that field we believe our courses are appropriate for these and other designations in the financial and investment field

PRIVACY & SECURITY

Typically, we do not release the names of individuals attending CAASA events - including to sponsors and speakers at events - although we may disclose the employers of attendees, except for those working at single family offices which are redacted. For this gathering, of course, all delegates have access to the individuals' names and employers for the purpose of scheduling meetings and booking seats at Table Talks. However, **we never release the email addresses or phone numbers of attendees**; asking instead that folks reach out via the mobile app / web portal or other means such as corporate websites or services such as LinkedIn. We can pass on contact requests to another party, without any guarantee of a response.

Read more at caasa.ca - or contact us at +1 (647) 953-0737 or paul@caasa.ca

CAASA WEALTH MANAGERS' FORUM - 2024 | 7

UPCOMING EVENTS

FAMILY OFFICE SUMMIT – APRIL 9-10 – TORONTO

THE MAPLE MODEL ON LAC LÉMAN – APRIL 23 – GENEVA

FOCUS ON ALTERNATIVES – MAY 7 – CALGARY

NETWORKING NIGHT – MAY 15, JULY 17, SEPT 17 – TORONTO

START-UP ROUND-UP PITCH COMPETITION – JUNE 17 – TORONTO

CAASA STAMPEDE WHOOP-UP – JULY 7 – TORONTO

PRIVATE MARKET FOCUS – SEPT 24-25 – TORONTO

DIGITAL ASSETS DAY – SEPT 26 – TORONTO

CAASA ANNUAL CONFERENCE – NOV 12-13 – MONTRÉAL

Details at: <https://caasa.ca/our-conferences-and-events#upcoming-events>



Special Thanks to Our 2024 Gold Partners



THE KYP NEXUS

STAY UPDATED, AS REQUIRED BY LAW

We are always seeking ways to facilitate industry participants to engage with each other and our new service **The KYP Nexus** is our latest offering that links asset managers with investment advisors.

Legislation in effect on **January 1, 2022** requires significant changes in an investment fund's terms to be communicated to investment advisors - and it also requires investment advisors (and their IIROC employers) to ensure that they are current on these changes. This communication could be in the form of a press release or other broadly distributed service, but the definition of 'significant' can be interpreted as a change in mandate, portfolio manager or the portfolio management team, fees attributable to the fund (including management and incentive), or even possibly the appointment of auditor or other service providers - these more nuanced changes might not warrant the expense of a full-blown press release, however. Also, we would be hard-pressed to assume that any advisor might have a process to keep track of all these changes.

ENTER THE NEXUS

Our solution, almost one year in the making, provides a one-stop solution for all Investment Advisors, their IIROC broker-dealers, and asset managers across Canada. It provides one point of contact for these parties to communicate significant changes and keeps a historical record as well.

The KYP Nexus is open to all market participants in Canada - whether a CAASA member or not, however members receive certain benefits in addition to the basic package. The coding and upkeep of the system is financed by our operating budget as a service to the industry.

EASY REGISTRATION

Investment Advisors can add their name to the list easily via the CAASA site and we guarantee that their information will not be distributed outside of our CAASA database. Once registered, IAs will receive a monthly update on significant changes from all asset manager/issuer participants on the platform which they or their staff can review and potentially integrate in their investment process.

IIROC Dealers can register a point of contact in their IA advisory or compliance teams to receive these monthly updates and send along to their IAs or have available in their intranet. Dealers can also provide IA contact information (simply email would suffice, but may include full name) in a bulk file to be uploaded to the CAASA database.

Asset Managers can register to the platform as well, providing a key contact who will update their information at least every month (can be done as it happens also). Basic services allow a notation that a significant change has occurred at the asset manager (which the IA can contact for more details). CAASA members can also include a description of the change, a link to their site to provide more information (such as a pdf or webpage), and contact information that can be used to get receive additional insight.

All of these services are offered without additional cost to all IAs, IIROC dealers, and asset managers.

JOIN NOW

The KYP Nexus is available now and actively adding IA, IIROC, and asset manager contacts. It's the law that this information is put into the hands of advisors in a timely manner and we are happy to provide this conduit of communication.

All market participants are welcome to contact us for more information about this initiative, membership, or anything else. We love feedback!

TORONTO – TUESDAY, MARCH 5

10:30 AM	<i>Registration & coffee</i>
10:45 AM	<p>Adding Alternatives to Your Book & Portfolio Allocation How do alternatives work in client portfolios? How have successful IAs added alts to their books and how did they manage the portfolio allocations? Forward-thinking advisors know that taking the time to understand alternatives can propel their business to new highs – as well as provide a moat of knowledge that differentiates them from their competitors. This talk will explain how this can be achieved from those who have seen it work in real life.</p> <p>Elina Surkov, Wellington-Altus Wealth Management Martin Pelletier, Wellington-Altus Private Counsel Cam Richards, Guardian Partners</p>
11:30 AM	<p>NowTalk – Looking Over the Liquidity Valley Illiquid investments pose many challenges: their pricing can be ‘stale-dated’, investment terms are typically long (i.e., not daily or weekly liquidity, but more likely monthly or even 5+ years), and there is not typically a secondary market if an investor needs to sell (although that is changing). Over the last few years various sub-sets of illiquid investments have faced challenges that can cause investors and their advisors to wring their hands – but that need not be the case if expectations are well-defined at the outset. This talk will illustrate how investors and advisors can start with the right perspective to allow them to see through trying times and extract the benefits of these securities.</p> <p>Bob Simpson, Wealth Stewards Victor Kuntzevitsky, Wellington-Altus Wealth Management</p>
NOON	<p>Lunch Keynote – The State of Alternatives in Canada Alternative investments have been available to Canadian retail/Accredited Investors for decades: from the first few hedge funds offered in the early 1990s, to the addition of various private investment vehicles as TMX-listed closed-end funds or as mutual funds on Fundserv, to the formal adoption of the Liquid Alts rules in January 2019. The industry has struggled with head office approvals, IA inertia, and the odd bad actor that has not made it any easier. This session will discuss the state of alternatives in Canada and where we are headed.</p> <p>Wilson Tow, Altrust Investment Solutions Steve Allen, Fiera Capital</p>
1:15 PM	<p>Table Talks Round table discussions hosted by our Sponsors. This session is aimed at providing all event attendees with the ability to join in genuine knowledge exchange and discussion in a small group setting.</p> <p><i>Choose from 2 x ~25-minute round table discussions</i></p>
2:15 PM	<p>Liquid Alts – Portfolio Panacea? It took six long years for the CSA, working with industry players, to create the Liquid Alts legislation and since its introduction the reception by the market has been not what some expected, but also better than previous alts regulations that did not work at all. With about 1% of investment/mutual fund AUM in liquid alts, it has a long way to go but performance (especially in crashing markets) has been as expected. Higher risk-adjusted returns and crisis alpha have been on display over the last 5+ years. This panel will discuss how IAs are making the most of this new arrow in their quiver and what the future of the industry might be</p> <p>Colleen Redmond, Morgan Stanley Wealth Management Brian D’Costa, Algonquin Capital Jocelyn Courcelles, Fundata Connor Sura, TURN8 Private Wealth</p>

TORONTO – TUESDAY, MARCH 5


3:00 PM	<p>What’s in Your Book? Trends in Canadian IA Portfolios Each IA is unique and focuses on a certain type of client – and their offering to these clients, while tailored to each investor’s needs, can be generally similar in many ways. As markets and products of offer by the dealer and asset management companies evolves, client portfolios naturally shift among asset classes, alternative strategies, investment strategies (who remembers borrowing to invest?), and the use of risk mitigators/enhancers such as derivatives. This panel will give a briefing of where each person started in the industry, what they have learned along the way, and where they are implementing these lessons in client portfolios.</p> <p>Mark Allen, RBC Dominion Securities Brianne Gardner, Raymond James Ted Karon, RBC Dominion Securities</p>
4:00 PM	<i>Reception - Opportunity to network over food and drinks!</i>
6:00 PM	End of Toronto Wealth Managers’ Forum Toronto 2024

CAASA'S MAPLE MODEL ON LAC LÉMAN


23 APRIL, 2024

CAASA www.caasa.ca


UNIVERSITY OF GENEVA




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former President & CEO
OTPP




Blair Richards
Chief Investment Officer
Port of Halifax ILA/HEA




Elena Manola-Bonthond
Chief Investment Officer
CERN Pension Fund




Aleksander Weiler
Chief Investment Officer
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WEALTH

What's missing?

ALT investments make your portfolio whole.

Alts are one of the fastest growing asset classes amongst high-net-worth investors for a reason – they have the potential to better diversify your portfolio.*
Learn more about Alternative investment strategies at ninepoint.com/alts



* forbes.com/sites/forbesfinancecouncil/2022/08/09/how-rising-interest-rates-affect-private-credit The information contained herein does not constitute an offer or solicitation by anyone in the United States or in any other jurisdiction in which such an offer or solicitation is not authorized or to any person to whom it is unlawful to make such an offer or solicitation. Prospective investors who are not resident in Canada should contact their financial advisor to determine whether securities of the Funds may be lawfully sold in their jurisdiction. The information provided is general in nature and is provided with the understanding that it may not be relied upon as, nor considered to be, the rendering of tax, legal, accounting or professional advice. Readers should consult with their own accountants and/or lawyers for advice on the specific circumstances before taking any action. Contact your investment advisor for more information.

MONTRÉAL – TUESDAY, 26 MARCH

10:30 AM	<i>Registration & coffee</i>
11:00 AM	<p>Adding Alternatives to Your Book & Portfolio Allocation Making the plunge into alts can be a dichotomy: it seems so obvious (risk mitigation, offering differentiation, client satisfaction) but the simple act of actually moving one's client book to alts can be daunting. For one, the IA needs to convince themselves and then their client that it makes sense – and then that must occur on an ongoing basis. This talk will delve into how IAs should view alts, how to add them to one's offering (both to new and current clients), and how to keep the faith when difficulties occur.</p> <p>Jean Chuang, MY Capital Management Corp. Brendan Rogers, RBC Dominion Securities Philippe Ducreux, Richardson Wealth</p>
11:45 AM	<p>NowTalk – LSFOS and IAs: How advisors can appeal to 'whales' Many IAs target UHNW individuals as part of their marketing plan, and as an individual's net worth increases, so does the likelihood of them having an in-house person to manage their affairs. This can be a boon for the IA, as they then have a market-person to interact with that might require less education on alts/their plan of action, but it can also mean an additional gatekeeper to convince. It could also mean stickier money if a transaction occurs, though, as the odds of having a more methodical and thought-out Investment Policy Statement can increase greatly. This talk will illustrate how IAs should best position themselves to gain access to this growing market.</p> <p>Philippe Roy, Private Family Office Adriana Arrillaga, One Summit Capital</p>
12:15 PM	<p>Lunch Keynote – The State of Alternatives in Canada Alternative investments have been available to Canadian retail/Accredited Investors for decades: from the first few hedge funds offered in the early 1990s, to the addition of various private investment vehicles as TMX-listed closed-end funds or as mutual funds on Fundserv, to the formal adoption of the Liquid Alts rules in January 2019. The industry has struggled with head office approvals, IA inertia, and the odd bad actor that has not made it any easier. This session will discuss the state of alternatives in Canada and where we are headed.</p> <p>Wilson Tow, Altrust Investment Solutions Steve Allen, Fiera Capital</p>
1:15 PM	<p>Table Talks Round table discussions hosted by our Sponsors. This session is aimed at providing all event attendees with the ability to join in genuine knowledge exchange and discussion in a small group setting.</p> <p><i>Choose from 2 x ~25-minute round table discussions</i></p>
2:15 PM	<p>Alternative Credit: Still just an alternative, or required now? Alt credit (aka private debt, private lending, and private credit) has started to shed its 'private' moniker – least of all because many managers are institutional-grade and open to transparency to their loan book and how they run their process. Allocators are interested in this area and investors require the diversification that these skill-based loans can bring – the effect of Central Banks' interest rate movements can be ameliorated (paradoxically) by the credit risk introduced by non-government guaranteed debt. This panel will delve into how investors view the space and are taking advantage of its unique characteristics.</p> <p>Tarik Serri, Trans-Canada Capital Francis Sabourin, Richardson Wealth Rob Anton, Next Edge Capital Fraser McEwen, Timbercreek</p>



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MGG's non-sponsor portfolios of uncorrelated, private lending and special situation investments are designed to deliver consistent high cash yields with upside and superior risk-adjusted returns in all market cycles. MGG's LPs are leading global, blue chip institutional endowment, foundation, pension, and insurance investors. MGG manages approximately \$4.5 billion of committed capital. MGG offers onshore and offshore vehicles in both drawdown and evergreen structures, including a Canada Fund, EU/AIFM Luxembourg vehicles, and a Rated Debt Feeder Fund.



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MONTRÉAL – TUESDAY, 26 MARCH

3:00 PM	<p>Alternatives in a Portfolio Setting This panel will discuss how IAs and clients can benefit from the advantages of alternatives in a variety of ways: funds, funds of funds, structured notes, and other means are all delivery methods for the positive effect that alts can have on a portfolio – especially one dominated by beta (and doubly-that of ones that are industry-concentrated).</p> <p>Andy Yan, Westcourt Capital Joe Bakish, Richardson Wealth</p>
4:00 PM	Reception - Opportunity to network over food and drinks!
6:00 PM	End of Toronto Wealth Managers' Forum Montréal 2024

**- ALL ATTENDEES ELIGIBLE FOR THIS PRIZE -
- BUT YOU MUST COMPLETE A BALLOT -**

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).

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 MSC 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. **Draw will occur at our Summer Social event on July 17, 2024.**

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



OUR DATAROOM

ALL THE DATA REQUIRED TO MEET YOUR (INVESTMENT) MATCH

At the suggestion of one of our single family office members, we partnered with **SigmaSandbox** to create a dataroom to provide a more robust experience for managers and investors by getting performance and other information into the hands of prospective investors. We believe this free offering, exclusive to CAASA members, can be used in advance of the conference, during it, and afterward as much as one might like.

FOR INVESTORS

Simply create a login and you can search the database, choose any number of funds, introduce them into a portfolio approximating yours (more than 2,500 ETFs and 115 indices to choose from) to see how they might have affected its returns, and/or download tear-sheets of the fund to get portfolio and other data on it, the manager, and whom to contact to get more information.

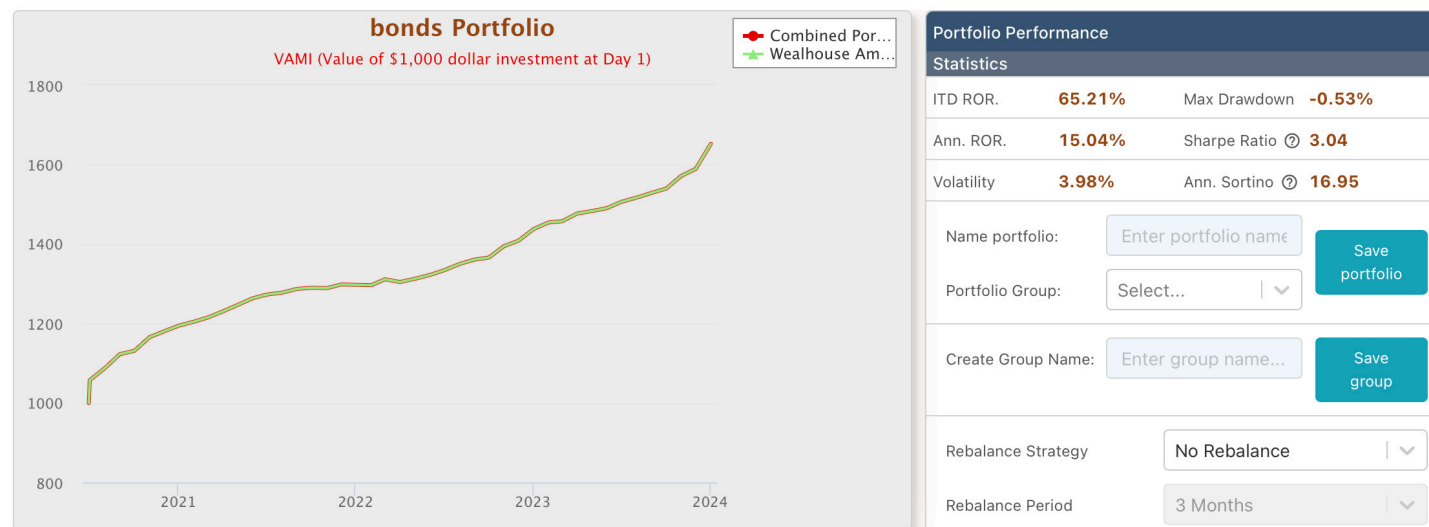
You can also produce pro forma portfolios (like the one below) to see how adding certain funds could have affected returns. The weighting of each fund can be easily adjusted - leading to all performance metrics being updated immediately.

To simplify your search, we have a special **CAASA Catalogue** that can be used to seek our members' tear-sheets and return profiles. This list is constantly growing as more of our manager members see the value in making their data available to select investors like yourself.

FOR MANAGERS

Uploading your performance and other information gets you on the radar of delegates at the conference and, as **SigmaSandbox** and CAASA will be making this available to more than 1,000 endowments, other significant investors, and wealth managers across North America and around the world with our ongoing events and those held in concert with other associations and the Government of Canada. It is simple and easy to do so and sets your fund apart with the opportunity to have many investors see how well you manage funds entrusted with you.

It is very easy to do the initial data population as well as monthly/periodic updates to the platform. Basically, SigmaSandbox does all of the heavy lifting and has created a very streamlined process requiring minimal additional effort on the managers' part.



Wealhouse Amplus Credit Income Fund Founders Class

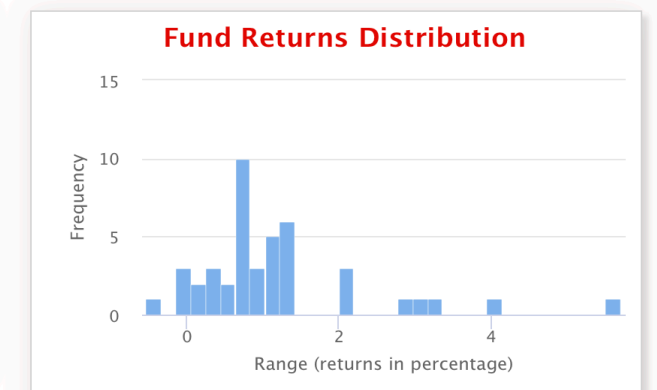
Contact Information

Wealhouse Capital Management
401 Bay Street, Suite 2404
Toronto M5H 2Y4

Fund Details

Amplus Credit Income Fund seeks value and opportunities primarily in the public debt marketplace. Amplus is designed to capitalize on market inefficiencies and mispricing while minimizing interest rate risk. Tailwinds in credit remain strong. Monetary and fiscal policies continue to be extremely accommodating. This is the ideal strategy for an inflationary and rising-rate environment.

Statistics & Ratios Summary		
	Fund	Benchmark
Ann. RoR	15.04 %	N/A
Sharpe Ratio	3.04	N/A
Volatility	3.98 %	N/A
Average Monthly Return	1.18 %	N/A
Highest Monthly Return	5.71 %	N/A
Lowest Monthly Return	-0.53 %	N/A
Maximum Drawdown	-0.53 %	N/A
% Positive Months	90.70 %	N/A
% Negative Months	9.30 %	N/A
Average Monthly Gain	1.32 %	N/A
Average Monthly Loss	-0.19 %	N/A
1Y Return	14.92 %	N/A
1Y Volatility	3.46 %	N/A
Ann.Sortino	16.95	N/A



About the manager:

Established in August 2008, Wealhouse Capital Management is a Toronto-based investment management firm focused on optimizing capital appreciation and preservation for our clients. Our investment philosophy is based on a fundamental, bottom-up approach. We believe superior investment performance can only be achieved through superb research. We comb the global markets for businesses with great long-term growth potential in earnings and free cash flow.

Monthly Performance

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD	YTD Benchmark
2024	3.96%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	3.96%	0.00%
2023	2.08%	1.16%	0.21%	1.34%	0.41%	0.49%	1.07%	0.70%	0.79%	0.70%	2.07%	1.14%	12.84%	0.00%
2022	-0.07%	-0.07%	1.15%	-0.53%	0.61%	0.74%	0.90%	1.17%	0.83%	0.39%	2.09%	0.99%	8.49%	0.00%
2021	1.23%	0.83%	0.86%	1.26%	1.30%	1.35%	0.77%	0.37%	0.75%	0.22%	-0.08%	0.72%	10.00%	0.00%
2020	N/A	N/A	N/A	N/A	N/A	N/A	5.71%	2.87%	3.24%	0.76%	3.02%	1.27%	18.02%	0.00%

SPEAKER BIOGRAPHIES

Mark Allen

Senior Portfolio Manager
RBC Dominion Securities

**YYZ
Speaker**



Mark has more than 20 years of experience serving corporate and private clients. He and his team provide wealth management services to private individuals and family office clients.

Mark has experience co-managing over \$1 billion of private client assets, including as a head-office portfolio manager at RBC handling institutional-level asset pools. As a Vice President, Mark was previously a member of RBC's Global Portfolio Advisory Committee, which establishes investment strategy for the firm.

Prior experience includes Director-level roles in investment banking and mergers & acquisitions at the global bank, UBS A.G., and at the Bank of Nova Scotia. From 2000-2008, he advised on transactions totaling \$18 billion for corporate clients in Canada, the U.S. and Europe.

Mark graduated with the highest GPA of 496 students in the Faculty of Applied Science (engineering) at Queen's University and with the highest GPA of ~100 students in his MBA class at the University of Toronto (Rotman School of Management).

Mark is a Board member of the national charitable organization, Mental Health Research Canada.

He and his wife live with their young twins in Toronto.

Steve Allen

Head of Distribution, Financial Intermediaries (Canada)
Fiera Capital

**YUL
Speaker**

**YYZ
Speaker**



Steve's role is to lead the distribution function for Fiera Capital's Canadian Financial intermediary business. More specifically, his focus is to diversify the business by establishing new top-line growth via Canadian banks, independent dealers, and family offices by creating investment vehicles that allow them to access both Fiera's private and public market strategies. Steve is also tasked with sourcing new sub-advisory relationships with large Canadian asset managers.

Over the past 26 years, Steve has had a number of roles in the industry. Notably:

- Director and Head of Structured Product Distribution, RBC Capital Markets
- Senior Vice President, Head of Canadian Distribution, Macquarie Global Investment
- Managing Director, Onex Credit Partners
- Founder, Executive Vice President, Evolve ETFs
- Partner, Senior Vice President, Brompton Funds
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In addition to his work, he is a founding member of the Canadian Association of Urban Financial Professionals and a member of the Black Opportunity Fund, two organizations based in Toronto that focus on building the economic empowerment of the Black community and promoting the advancement of Black professionals. Steve's community work is very important to him as it allows him to give back so that others can access opportunities that they might otherwise be denied due to their race, socio-economic background, gender, sexual orientation, or disability status. This passion has also led him to join Fiera's DE&I Council to help promote a culture that is inclusive and welcoming for everyone.

SPEAKER BIOGRAPHIES

Rob Anton

President & Partner
Next Edge Capital

**YUL
Speaker**



Robert Anton is the President and founding partner of Next Edge Capital. Robert has been active in the financial services industry for over 30 years, beginning his career as an Investment Advisor where he worked at various Canadian Financial Institutions. Prior to the formation of Next Edge Capital via a management spin-out of the business, Robert was the Executive Vice President, Sales for Man Investments Canada, aiding in the set up of Man's Canadian office. Prior to Man, he served as Executive Vice President, National Sales Manager of BluMont Capital, a Toronto-based hedge fund company, joining the company in 2001 as a start-up operation, and overseeing its asset growth until his departure to join Man in 2006.

Robert holds a Bachelor of Arts from Wilfred Laurier University in Waterloo, as well as the Chartered Alternative Investment Analyst (CAIA) designation. From 2007 to 2009 he was an instructor for the Canadian Securities Institute teaching the Due Diligence on Hedge Funds course.

Adriana Arrillaga

President & Portfolio Manager
One Summit Capital Wealth Management Inc.

**YUL
Speaker**



Adriana is President and Portfolio Manager of One Summit Capital. Adriana's extensive career in the investment management industry, includes 15 years as Senior Portfolio Manager in charge of institutional mandates for foreign pension funds.

During her career, Adriana has worked with institutional asset managers as well as major Canadian Financial Institutions. Adriana is an alumnus of John Molson School of Business, where she graduated with a B. Comm. Finance Major.

Adriana is a CFA charterholder and was conferred the FCSI designation (Fellow of the Canadian Securities Institute). Adriana is a member of CFA Montreal, Women in Investment Management Committee, where she leads the Scholarships Selection Committee. Adriana volunteers as a guest speaker at the Goodman Mentor Circle and as guest lecturer at JMSB.

Adriana values the importance of women's financial education. In 2018, she established an annual scholarship with Concordia University to help encourage female finance students to pursue their CFA designation. Adriana is a founding member donor of Women Impact Montreal fund, a member of Tiger 21, and a voting member of Conservation Manitou.

SPEAKER BIOGRAPHIES

Joe Bakish
Portfolio Manager, Wealth Advisor, Investment Advisor
Richardson Wealth

YUL
Speaker



Joseph Bakish is a Portfolio Manager, Wealth Advisor, Investment Advisor at Bakish Wealth, at the firm Richardson Wealth Limited. Named Canada's Top Under 40 Investment Advisors in 2020 by the Investment Industry Association Of Canada, Joseph Bakish has built his career by putting the best interests of his clients at the forefront of his objectives.

After initially building a solid practice at Investors Group, Joseph realized that as business and the industry was evolving, they needed a change. Bakish Wealth joined Richardson Wealth six years ago, which has opened the door to a wider universe of alternative assets that can add value and enhance portfolio diversification – from private equity and real estate to private debt. Clients have responded well to their unbiased access to investment solutions, which has led to a growing referral base and the expansion into their third client segment of high-net-worth investors.

Bakish Wealth's book boasts \$242 million in assets under management (AUM) across 490 households, as well as a large insurance component. Most of their clients are between 40 and 60 years old, and many are research-oriented physicians, medical researchers, and university professors. Their clients also include high-net-worth business owners and high-potential young professionals. For prospects with established careers, their minimum investment is \$1 million.

James Burrton
Co-Founder & Partner
CAASA

YYZ
Speaker

YUL
Speaker



James co-founded CAASA in response to industry support for a Canadian alternatives association to serve all aspects including: hedge / alternative strategies; private lending; private real estate; private equity; plus emerging areas where Canada is a leader such as digital assets / blockchain and robo-advisors.

Prior to CAASA, James was the Chief Operating Officer of AIMA Canada where his team of three worked with 12 committees to produce 50-60 events per annum across Canada, organized 100+ committee meetings, and increase member numbers over his 7-year tenure from 66 to 164 corporate entities.

James currently sits on the Canadian Investment Funds Standards Committee (CIFSC), which categorizes mutual funds and alternative mutual funds (aka liquid alternatives) for the retail space in Canada. He is also called upon by membership and industry groups to speak to risk ratings and portfolio placement of all types of alternative investments.

James also has experience in research and writing for the CAIA Association (holding the designation since 2006) as well as serving on CAIA's exam council and as a well as other duties. He had roles in institutional sales and FoHF structuring in Seoul, South Korea, as a Product Manager at ICICI Wealth Management, and as an Investment Advisor at RBC Dominion Securities. James graduated from Simon Fraser University with a BBA (Finance).

SPEAKER BIOGRAPHIES

Jean Chuang
Vice President, Portfolio Manager
MY Capital Management Corp.

YUL
Speaker



Jean Chuang is a Portfolio Manager at M.Y. Capital Management Corp. She manages the Saturnus Global Pools, a global macro investment strategy at M.Y. Capital Management Corp. Jean integrates discretionary portfolio management and wealth planning to customize strategies for the firm's clients to accumulate long-term wealth.

She has more than 20 years of experience in the financial industry consisting of banking, lending, investment management and wealth planning; through key roles in Canada's largest financial institutions.

Jean currently holds the (CIM) Chartered Investment Manager and the (FCSI) Fellow of the Canadian Securities Institute.

Jocelyn Courcelles
VP Client Relations & Business Development
Fundata Canada

YYZ
Speaker



Jocelyn joined Fundata Canada in January 2014. Prior to joining, he held roles with the Canadian Armed Forces, Invesco, and TD Commercial Bank.

Brian D'Costa
Founding Partner & President
Algonquin Capital

YYZ
Speaker



From Captain in the Airborne Regiment to managing global trading businesses, Brian has achieved tremendous success as a leader, trader, and risk manager. As the former Global Head of Fixed Income and Rates for CIBC, he was responsible for the bank's entire bond and rate trading business, overseeing 40 traders globally. Before that, Brian spent 11 years with TD Securities, where he was the Global Head of Vanilla Interest Rate Derivatives, managing trading teams in Toronto, London, Tokyo, and Sydney.

As a Captain in the Canadian Armed Forces, he was awarded the Chief of Defense Staff Commendation for exemplary leadership for his peacekeeping services in Iraq. Brian is a member of the Bank of Canada Fixed Income Forum. When not in the office, Brian can usually be found in the gym, at a hockey rink, or undertaking an ambitious gardening project.

SPEAKER BIOGRAPHIES

Philippe Ducreux

Portfolio Manager & Investment Advisor
Richardson Wealth

YUL
Speaker



Philippe began his career in 1997 and has worked for several large financial institutions, first in retail advisory and then as a trader. In 2004, Philippe joined Richardson Wealth. In addition to his passion for investment, Philippe spends a great deal of time working with youth sports organizations.

Philippe holds a Bachelor's degree in Finance from Laval University and is a Chartered Financial Analyst (CFA) and Portfolio Manager.

Brianne Gardner

Wealth Manager & Financial Advisor
Raymond James Ltd.

YYZ
Speaker



Brianne is the Senior Wealth Manager and the Managing Partner of Velocity Investment Partners at Raymond James, where she utilizes her extensive knowledge and expertise to serve high net worth families with complex financial needs. Her ability to comprehend the unique financial challenges of multi-generational families distinguishes her in the industry and offers clients the confidence and assurance they need.

She heads a team that caters to an exclusive clientele of individuals and wealthy families across Canada and the US who are seeking a personal trusted partner and CFO to manage their financial affairs with expert guidance. She and her team are now one of the fastest growing teams across Canada and is a regular media contributor on BNN Bloomberg, The Globe & Mail, Financial Post and much more.

Ted Karon

Portfolio Manager
RBC Dominion Securities

YYZ
Speaker



Ted draws on his expert knowledge and 30 years of experience in the financial services industry to provide access to a comprehensive range of services to help you build and protect your wealth. For the past two decades, Ted has been working with high net worth individuals and families to help them meet their complex financial goals.

His depth of experience includes investment banking, commercial lending, mergers and acquisitions, equity research and portfolio management. Over the years, Ted has also developed extensive expertise in the alternative investment sector. He is a member and past speaker for the Canadian Association of Alternative Strategies & Assets (CAASA). Ted brings a holistic perspective on investing to his work, ensuring sound advice, expert execution and peace of mind for clients who need solutions for broad and multi-dimensional wealth management needs.

A graduate of Queen's University, he earned a Bachelor of Commerce degree with a major in finance. A firm believer in ongoing education, he has acquired the Chartered Financial Analyst (CFA) designation, and licenses for insurance, derivatives fundamentals and options.

Away from work, Ted enjoys spending time with his wife, Lesley, and two daughters, Rebecca and Amy. He also enjoys stays active playing competitive badminton, skiing and windsurfing.

SPEAKER BIOGRAPHIES

Victor Kuntzevitsky

Portfolio Manager
Wellington-Altus Private Counsel

YYZ
Speaker



Victor is responsible for directing all external manager research focusing on the investment process including selection, due-diligence, benchmarking, and monitoring. He is intimately involved in every step of the investment cycle and an integral part of the team.

Prior to joining Wellington-Altus, Victor spent the first nine years of his career at a Markham-based Multi-Family Office where he worked to help create, monitor and maintain bespoke portfolios across a broad set of public and private investment strategies.

Victor graduated with an Honours Bachelor of Commerce degree from McMaster University. Victor is a CFA charterholder and has also obtained the Chartered Alternative Investment Analyst (CAIA) designation. He is a lifelong learner, intellectually curious, and has interest across many disciplines.

Victor is committed to philanthropy and giving back to the community. He now sits on the board of 'Second Kicks' which distributed close to 10,000 of lightly used soccer equipment to communities in Canada and around the world in 2020. He also co-founded the organization 'Get Swabbed', which has since expanded to all Canadian universities with a goal of enlisting donors to Canadian Blood Services' bone marrow registry.

In his free time Victor enjoys reading, watching travel shows, cooking (and eating), and spending time with his wife and young kids.

Fraser McEwen

Timbercreek

YUL
Speaker



Fraser McEwen joined Timbercreek in the fall of 2023 where he is responsible for leveraging the broader Timbercreek platform to bring existing strategies and other unique alternative investment solutions to wealth management and family office channels.

Mr. McEwen has over 26 years of experience in the investment industry. Prior to joining Timbercreek, Mr. McEwen was Co-Founder and Partner of Slate Securities LP, an investment management firm dedicated to real estate investing. Before that he held the position of Director, Retail Capital Markets at GMP Securities where he was responsible for the origination, structuring and distribution of new issue offerings and prior to GMP he was Senior Vice President at HSBC Bank Canada where he led the structured derivatives solutions group. Mr. McEwen's career began in portfolio management at SVC O'Donnell Mutual Funds.

Mr. McEwen holds a Bachelor of Science degree from University of Western Ontario and has earned the Chartered Alternative Investment Analyst (CAIA) designation.

SPEAKER BIOGRAPHIES

Martin Pelletier
Senior Portfolio Manager
Wellington-Altus Private Counsel

**YYZ
Speaker**



Martin has more than 20 years of investment industry experience including senior-level positions in both institutional equity research and portfolio management. Martin is currently a senior portfolio manager at Wellington-Altus Private Counsel (previously TriVest Wealth), an award-winning portfolio management firm (Wealth Professional 5-Star Asset Manager 2022), where he is the co-manager of the firm's risk-managed balanced fund and helps oversee custom built, HNW and UHNW private client portfolios.

Prior to co-founding TriVest and its sale to Wellington-Altus in early 2020, Martin's career was focused on institutional energy equity research and capital markets primarily at two top-ranked boutique investment banks. He provided investment recommendations on energy markets, commodities, and individual security selections to institutional fund managers located in Canada, the U.S. and Europe. Martin is regularly featured in the media as a market strategist including his weekly column to the Financial Post's Investment Pro section for the past decade. He was won numerous awards for his passion for financial education and quality of service provided for his clients.

Martin holds a Bachelor of Commerce degree with a specialization in finance from the University of Alberta, studied international economics and finance at Örebro University in Sweden, and is a Chartered Financial Analyst (CFA) Charterholder.

Colleen Redmond
Vice President, Investment Product Research
Morgan Stanley Wealth Management Canada Inc.

**YYZ
Speaker**



As part of the product team at Morgan Stanley Wealth Management Canada (MSWC), Colleen is responsible for conducting initial and ongoing due diligence on various investment products including mutual funds, ETFs, SMAs and alternatives. She works closely with internal and external partners to build out the MSWC product shelf. Prior to joining Morgan Stanley in 2022, Colleen spent over seven years at CI Global Asset Management including four years as the product manager for CI's suite of liquid alternative products. She also held roles in operations, client services and sales. Colleen holds a BBA from Wilfrid Laurier University and is a Chartered Financial Analyst. Colleen is an avid runner. In her spare time, she enjoys training for her next marathon.

Cam Richards
Chief Investment Officer
Guardian Partners

**YYZ
Speaker**



As Chief Investment Officer at Guardian Partners, Cameron's mission is to combine the investment strategies and disciplined portfolio construction and risk management utilized by pension funds and endowments, with the customization and client responsiveness required by private clients, to increase the robustness of investment solutions and to enhance the experience of Guardian Partners' clients. Previously, he served as CIO of the Nova Scotia Health Employees' Pension Plan, and was the Head of Real Assets at Albourne Partners in London, England. He also served as the Co-Chief Investment Officer of University of Toronto Asset Management (UTAM), and Chair of the Investment Committee for the entirety of the university's investment assets. Before joining Guardian Partners, he founded Isengard Capital Management, which provided capital markets research to Albourne Partners and also designed a research platform which applied global macro, stock selection and quantitative strategies to generate long and short exposures in stocks.

Cameron is a graduate of Osgoode Hall Law School in Toronto, holds a Bachelor's Degree in Mathematics from Queen's University, earned an MBA from the Schulich School of Business and is a CFA® Charterholder. He has been called to the Bar in Ontario.

SPEAKER BIOGRAPHIES

Brendan Rogers
Senior Investment & Wealth Advisor
RBC Dominion Securities

**YUL
Speaker**



Brendan Rogers is a Senior Investment & Wealth Advisor for RBC Dominion Securities. Alongside his team, Rogers Wealth Management Group, Brendan is committed to providing focused and integrated financial services to high-net worth clients. A more than two-decade veteran of RBC, Brendan is dedicated to protecting, preserving, and growing the wealth of investors coast to coast who desire long-term, financial independence.

Now residing in Winnipeg, Brendan was born and raised in Vancouver before attending Eastern Washington University where he earned a Bachelor of Arts (Hons.) and achieved the title of Academic All American. He enjoyed nine years in the Canadian Football League and competed in four Grey Cup finals.

Brendan actively fundraises, supports, and volunteers with several causes including organizations that support diversity & inclusion and health & wellness of youth. His fundraising efforts have taken him to the top of mountains around the world and had him scaling down buildings a little closer to home.

Brendan proudly holds a Financial Management Advisor (FMA) designation and most recently earned his Family Enterprise Advisor designation in 2020.

Louis-Philippe Roy
Director of Investments
Private Family Office

**YUL
Speaker**



Mr. Roy held various positions at National Bank of Canada, Innocap, and TD Asset Management before taking on his current role of Director of Investments with a private family office in Montreal.

He has a BA, Economics from Western University and an MFE, Finance from the Rotman School of Business, University of Toronto.

Francis Sabourin
Portfolio Manager & Investment Advisor
Richardson Wealth

**YUL
Speaker**



Financial Planner and Portfolio Manager, Francis Sabourin, Director, Wealth Management at Richardson Wealth, was awarded the Distinguished Advisor Award (prix Conseiller émérite) for the year 2016 by the publication Finance et Investissement, highlighting the good performance of his portfolios, both equal to or higher than the benchmarks, while minimizing the risks, thereby focusing on good capital protection. The Advisor of the Year Award is designed to recognize an advisor with at least 20 years of experience, who has marked the financial industry with a unique and remarkable practice. Francis celebrated 30 years of practice on October 5, 2022.

SPEAKER BIOGRAPHIES

Tarik Serri
Senior Director, Hedge Funds & Alternative Investments
Trans-Canada Capital

YUL
Speaker

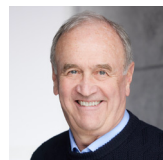


As senior director, hedge funds and alternative investments, Tarik Serri is responsible for the ongoing management, monitoring and research of all TCC's hedge fund and private debt portfolios, which are part of a diversified alternatives program investing in global hedge funds and alternative strategies. He joined the firm in 2011 and has over 17 years of investment experience, having previously worked as an analyst and investment advisor at several financial institutions.

Serri holds a bachelor of commerce degree from Concordia University and a master of business administration from HEC Montréal. He has completed the Canadian Securities Course offered by the Canadian Securities Institute and is a CFA and CAIA charterholder. He is also a recipient of the NextGen 2019 nomination by CIO Magazine.

Bob Simpson
Vice President Portfolio Strategy
Wealth Stewards

YYZ
Speaker



Bob Simpson is Vice President Portfolio Strategy for Wealth Stewards Inc., a Toronto-based Wealth management firm, Co-founder of PrivateDebtandEquity.ca and host of My Private Network Podcast, both designed to educate investors about investing in private markets.

Prior to joining Wealth Stewards, he was President of Synchronicity Performance Consultants, a consulting and coaching firm focused on successful financial advisors across North America.

Prior to that he was SVP National Sales and Fixed Income Strategist at Midland Walwyn, portfolio manager for a publicly-traded insurance company and a successful financial advisor at Nesbitt Thomson.

Conner Sura
Portfolio Manager
TURN8 Private Wealth

YYZ
Speaker



Conner is an accomplished investment professional with a diverse background in portfolio and wealth management, investment research and product strategy. He currently serves as a portfolio manager at TURN8 Private Wealth, a boutique wealth management firm known for its commitment to innovation and tailored portfolio solutions. Within TURN8, Conner oversees the management of fixed income and alternative investments across three pooled vehicles. Before joining TURN8, Conner spent time working at a prominent Toronto-based multi-family office, a long/short credit hedge fund, and one of Canada's largest mutual fund manufacturers.

He holds a bachelor's degree in mechanical engineering from Queen's University and has earned the CFA designation. Additionally, Conner is registered as a portfolio manager with the securities regulator.

SPEAKER BIOGRAPHIES

Elina Surkov
Investment Advisor
Wellington-Altus Wealth Management

YYZ
Speaker



Elina Surkov is a highly skilled Investment Advisor at Wellington-Altus, with over a decade of experience in the financial sector. Elina and her team's focus is on the long-term with an aim to establish lasting relationships with each and every client that range from high-net-worth individuals and families to industry veterans like family office CIO's, traders, hedge fund managers, private equity and venture capitalists, and angel investors. Elina has a strong academic foundation with a Master of Science in Financial Markets and an MBA from France. Her career is marked by roles in various prestigious organizations, from private banking and family offices in Monaco to independent investment companies in Canada, demonstrating her expertise in portfolio construction, alternative investments, and a commitment to professional development.

Wilson Tow
Managing Partner
Altrust Investment Solutions

YYZ
Speaker

YUL
Speaker



Wilson Tow is recognized as one of the most knowledgeable investment product design and product-compliance specialists in Canada. He has spent over 30 years working in wealth and asset management. As a Co-Founder and Managing Partner of Altrust, Mr. Tow advises on product structures, investment design, compliance, distribution requirements, and he works to educate investors on the benefits of alternative investment solutions. Prior to co-founding Altrust Investment Solutions, Mr. Tow was Co-Founder and Managing Partner at Fern Capital Partners where he created and launched a unique alternative credit fund-of-funds mixing both private and public credit solutions. The novel structure offered retail investors access to assets traditionally available only to institutional investors.

Previously, Mr. Tow was Director of New Products and Complex Investments at Scotia Wealth where he oversaw the due diligence and approval process for all investment products offered on Scotia Wealth's product shelf. This included a broad range of instruments ranging from GICs to non-brokered private placements and prospectus-exempt securities. Under Mr. Tow's leadership, Scotia's alternative offerings grew meaningfully, helping investment advisors and investors structure more robust investment portfolios. Prior to Scotia Wealth, Mr. Tow was Head of Product Research at Manulife Securities where he was responsible for formulating, designing, and implementing the firm's due diligence process.

Before moving to wealth management in 2006, Mr. Tow spent the previous twelve years in the asset management business, starting his career at Scudder Canada and its successor companies where he held senior roles in relationship management as well as product management and development. He also spent some time at Maple Financial where he was an analyst and allocator for its fund-of-hedge-funds product. Mr. Tow is very active in the alternative asset industry in Canada and currently sits on the Member Advisory Panel of the Canadian Association of Alternative Strategies & Assets ("CAASA"). He also sits on the board of the Japanese Canadian Cultural Centre Foundation. Mr. Tow holds a Bachelor of Science degree from the University of Toronto, where he majored in Mathematics and Philosophy.

Andy Yan
Principal, Partner Solutions
Westcourt Capital Corporation

YUL
Speaker



As Principal, Partner Solutions, Andy is responsible for the growth and development of Westcourt's Partners. Andy previously worked at a large alternative equities manager focusing on long/short strategies where he facilitated the national roll-out of two new alternative mutual funds (both liquid alts) across Canada's bank advisory and independent wealth management platforms. With his deep knowledge of alternative investments, Andy advised his clients on the roles that these strategies play in a well-diversified client portfolio.

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