



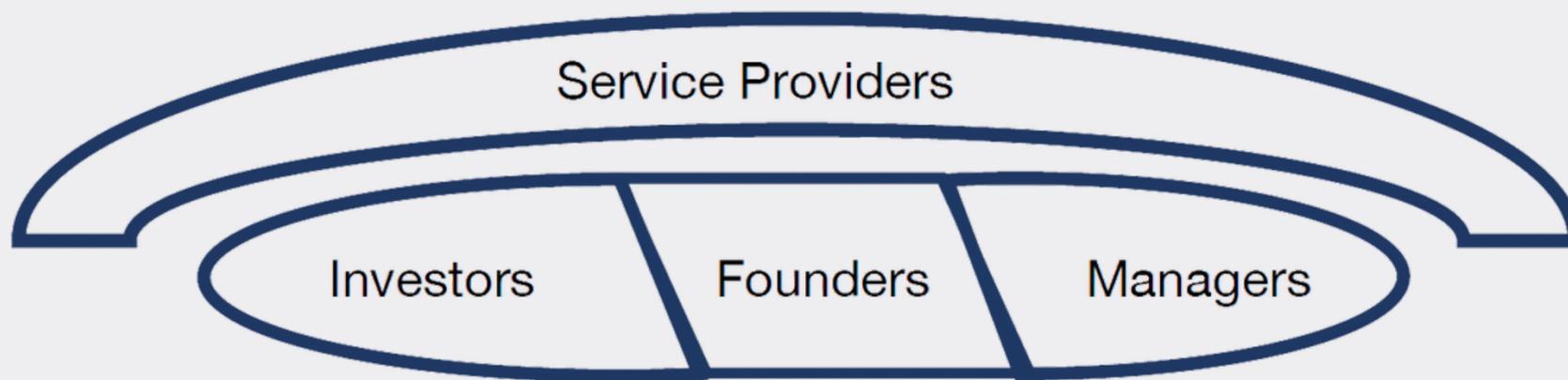
CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

BRINGING CANADA TO THE WORLD AND THE WORLD TO CANADA

April 1, 2024 Edition

ABOUT CAASA



Presentation are communication tools that can be used as demonstrations, lectures, reports.

The Canadian Association of Alternative Strategies & Assets was formed to bring together alternative investment managers and investors, along with service providers, in a setting conducive to information sharing, discussion and networking, and collaborative initiatives.

ABOUT CAASA

INCLUSIVENESS

CAASA represents a broad cross-section of public and private market participants whose offerings are distributed to true retail, Accredited Investor retail, family offices, endowments, foundations, public and private pension plans, and sovereign wealth funds.

Public markets include hedge / alternative strategy asset managers such as managed futures / CTAs,

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long-short equity, equity market neutral, credit and fixed income funds with varying exposures and arbitrage strategies, multi-strategy, special situations, and others that deal in predominantly public / readily priced /quoted markets.

Private markets include private lending (from factoring and revolvers to longerterm financing), direct and fund-structured real estate and development investments, private equity (including PE debt and PE real estate), alt alts such as weather derivatives, and other areas that may not be readily priced / valued.

ABOUT CAASA

MEMBER BENEFITS

For Investors – A network of pension plans, foundations, endowments, sovereign wealth funds, and family offices to network with on a formal and casual basis as well as resources for analyzing managers and services providers.

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For Managers – Peer connection in areas such as fund structuring, sales & marketing, and regulatory issues. Access to investors (opt-in for investors) as well as exposure through panels and conferences targeted to particular groups

For Service Providers – Relevant working groups, event participation / sponsorship, industry thought leadership, and interaction with a wide crosssection of manager and investors.

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For Start-up Founders - A diverse network of peers and investors (SFOs and VC shops) that can power one's plans from start-up and beyond.

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For All – Through our partnerships with the the Professional Centre and the CAIA Association, CAASA Classroom sessions and discounted space as well as access to CAIA's Alternative Investment Analyst Review and discounts on both courses.

ABOUT CAASA

FROM LOCAL TO GLOBAL – AND BACK AGAIN

CAASA's activity is in all areas of Canada, from larger asset management hub, to those with major / a concentration of investors, to others where service providers congregate. Examples include: Toronto, Montréal, Québec, Halifax, Ottawa, Vancouver, Victoria, Calgary, Edmonton, and Winnipeg. It is important for a truly national organization to be engaged in all aspects and regions – and being present in these areas leads to important market intelligence and the ability to tailor CAASA's offering as well as provide insights to its members and stakeholders.

CAASA strongly believes that Canada is a leader in many areas of investment management and can learn from other countries' experts as well and providing domestic and foreign / overseas opportunities where global professionals and organizations can meet and exchange best practices & policies and work together on current issues and trends.



CAASA organizes major conferences in Canada and other events and forums elsewhere.

We treat all members the same: all have access to all services & we do not promote one member above another.

ABOUT CAASA

GOVERNANCE AND STRUCTURE

CAASA was created and is controlled by the membership and local staff for the benefit of members and the Canadian alternatives industry at large.

The association's Member Advisory Panel (MAP) works with its staff in formulating and adapting overall strategy, new and continuing initiatives, event and conference themes and formats, and creation of various Member Initiative Groups (MIGs) that focus on particular aspects and/or geographical areas in the Canadian alternatives industry.

CAASA staff are tasked with attending each meeting of the MAP and MIGs, providing logistical, thematic, format, and other support relating to the execution of its activities

All meetings and activities are governed by the principles of inclusiveness, collaboration, fairness, and elucidation.





CAASA's Activities

CAASA serves and represents the alternatives industry in Canada by engaging in member-lead local and national initiatives in advocacy; investor, manager, and industry best practices & policies; committees and working groups dedicated to broad mandates as well as those uniquely Canadian and in areas of national or regional expertise; and production of thought leadership events, publications, and initiatives affecting the Canadian and global alternative investment landscape.

CAASA'S ACTIVITIES

CAASA CE Centre

CAASA'S ACTIVITIES

Developed as part of our continued support of the Canadian alternative investment industry and in partnership with Learnedly, a leading supplier of licensing and accreditation courses and services, we designed the CAASA CE Centre to provide a simple way for Investment Advisors and other professionals to earn the continuing education credits required by their licensing bodies.

Our curated offering includes CAASA podcasts and webinars, as well as selected conference programming and that of our members, resulting in a curated, relevant, and interesting variety of topics – all from the alternative investment arena such as: liquid alternatives, credit & fixed income funds, private equity, private lending, real estate, derivatives, Know Your Product (Compliance Credit), ETFs, crypto-currencies, quantitative trading, portfolio construction, the landscape of alternatives, PE replication, and many more topics. We expect to have 100 courses (32S at present) by mid-2021.

CAASA'S ACTIVITIES

Podcasts & Webinars

We produce ~12 podcasts and ~20 webinars each year (substantially more during COVID). These are free for all members to participate in. Contact us for more details and to be a part of our next offering!

Virtual Dataroom - Funds

Together with SigmaSandbox, we are proud to offer an enhanced experience to our Virtual Dataroom in which members can post their company bios and contact information as well as upload monthly performance statistics. A top-sheet can be generated and sent to clients and prospects and investors are invited to search the database of managers (with CAASA members prominently displayed) and perform what-if scenarios based upon their portfolio holdings and proxies.

This benefit is free for all CAASA members and features prominent display of members.



Areas of activity

CAASA'S ACTIVITIES

Diversity and Engagement

Alternative asset management often involves the creation, implementation, and monitoring of new and sophisticated trades, strategies, and asset classes. Being open to the best minds available allows the industry to innovate as well as take advantage of opportunities. Career panels, stock/idea pitch competitions, and other events aimed at students and particular groups will enhance our industry's place in career paths.



Prudent Processes & Policies

Providing input from leaders in operational and compliance roles at institutional investors, investment funds, and service providers and consultants, members and the public will receive 3P publications, panels and roundtables, and other programming to enable them to better comply with regulatory changes and investor requirements and preferences.

COLE'S NOTES OF DIFFERENTIATORS

What we do and do not do

Our business plan is centred around privacy, catering to investor preferences, and opt-in formats as much as possible.

- **Speaking opportunities are invite-only.** We do not engage in pay-to-play; we draw speakers from membership only (unless a pension, SFO, or non-industry speaker); we ask that all participants NOT mention returns or specific products, and focus on the theme/topic of the panel/question.
 - **We prefer having investors on panels** (since we are not monetizing them) – as such, manager & service provider members should not assume a set number of speaking opportunities when joining/renewing. We also do not entertain a notion of joining/renewing on the pretext of speaking.
 - **We are not a cap intro team:** we do not guarantee a certain number of meetings; we do not provide introductions (unless requested by investors); and we do not have a listing of all investors and what they are looking for. We provide venues/platforms where folks can meet and communicate.
 - **We do not share anyone's contact information** (unless already public in the member directory).
 - **We strive to have a mix of 40% investors, 40-50% managers, and 10-20% service providers** at our conferences.
 - **We do not get a member an audience** for a lunch & learn, although we can promote it via our events blasts.
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Conference Programs

Our Family Office Summit, CAASA Annual Conference, Wealth Managers' Forum, CAASA Alternative Perspectives, and SuperWeek all include a program detailing the events speakers and schedule as well as a complete member directory including contact information (as applicable).

Annual Review

Around January 7 each year we publish our Annual Review with a comprehensive listing of all CAASA members in each category as well as a full listing of all of our activities of the previous year.

CAASA'S PUBLICATIONS



Papers & primers

We produce 2-4 each year. Cost is \$3,000 per memner (lanteed to 4-8 members per edition) which is spent on drafting, editing, and printing 1,000 copies (also available online on our Publications page). We invite certain members to participate and welcome suggestions for topics throughout the year.

KEEPING TABS ON INDUSTRY NICHEs



CANADIAN CRYPTO-FUND UPDATE

A complete listing of all crypto-asset funds in the Canadian marketplace

CAASA members listed:

- 3iQ Digital Asset Management
- CI GLOBAL ASSET MANAGEMENT
- Evolve ETFs
- GALAXY DIGITAL
- HORIZONS EXCHANGE TRADED FUNDS



CANADIAN LIQUID ALTS UPDATE

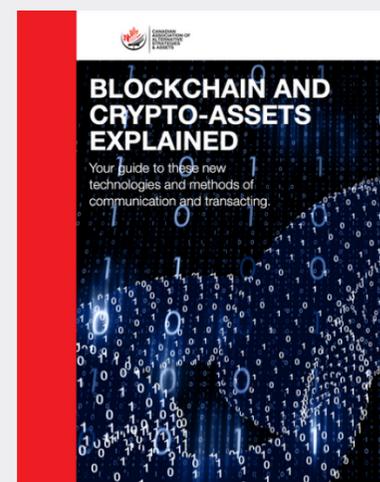
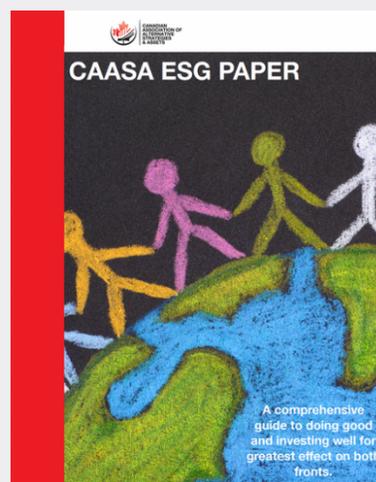
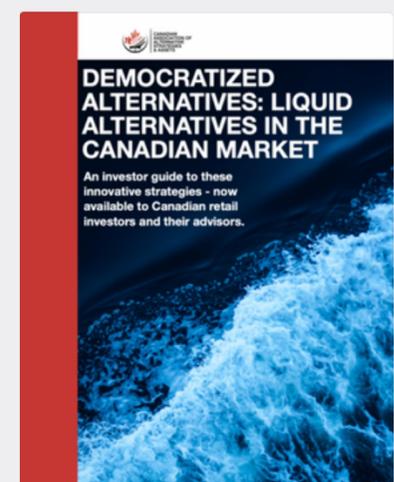
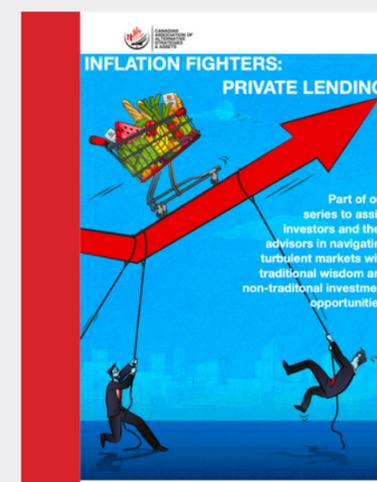
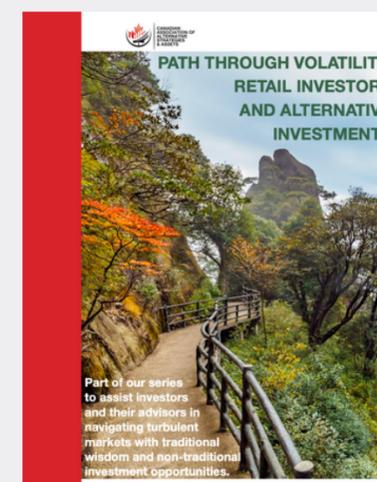
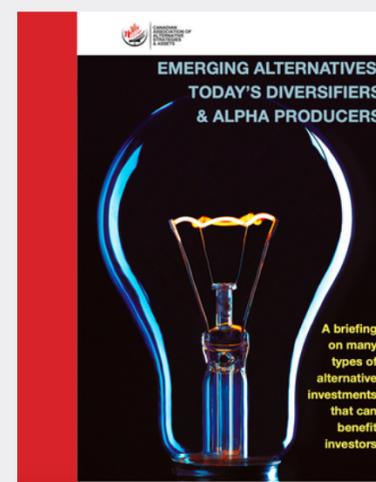
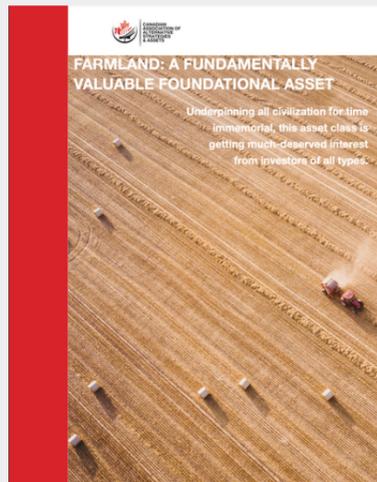
A complete listing of all liquid alternative funds in the Canadian marketplace

CAASA MEMBER VERSION

CAASA members listed:

- AGF
- ALGONQUIN
- CI GLOBAL ASSET MANAGEMENT
- MAXAM CAPITAL MANAGEMENT
- CONNOR, CLARK & LUNN FUNDS
- Evolve ETFs
- CIBC CBC Asset Management
- PICTON MAHONEY Asset Management
- ehp FUNDS
- Desjardins Wealth Management
- MACKENZIE Investments
- HORIZONS EXCHANGE TRADED FUNDS
- YTM CAPITAL
- WAYPOINT INVESTMENT PARTNERS
- WARATAH

A PLETHORA OF THOUGHT LEADERSHIP PIECES



...MORE TO COME!

ANNUAL RETROSPECTIVES AVAILABLE ONLINE

CAASA Annual Review 2023



YYZ - EYW - MIA - PHX - ZRH - GUR - LAX - DFW - AUS - IAH - LAX - AUB - LGA - VYZ
 YYZ - EWR - GCM - IAH - YYZ - YUL - DUB - LHR - FRA - NOL - DFW - AUS - DUB - YVR - VYZ
 YYZ - YUL - GUR - FCO - YYC - YVR - ORD - MIA - SRN - YUL - ICN - CDG - YVR - SFO - VYZ
 YYZ - YWG - SEA - LAX - YYC - YUL - LGA - DNB - LHR - YUL - EWR - YUL - LGA - VYZ

CAASA Annual Review 2022



YYZ - EYW - MIA - PHX - ZRH - GUR - LAX - DFW - AUS - IAH - LAX - PBI - LGA - AUS - VYZ
 YYZ - EWR - GCM - IAH - YYZ - YUL - DUB - LHR - LUX - MUC - DFW - AUS - DUB - YVR - VYZ
 YYZ - YUL - GUR - HZG - YYC - YVR - ORD - MIA - ICN - YUL - ICN - PUS - YVR - SFO - VYZ
 YYZ - YWG - SEA - LAX - YYC - BDR - YUL - LGA - DNB - LHR - YUL - EWR - YUL - LGA - VYZ

CAASA Annual Review 2021

How it started: (2021 2018 membership) | How it's going: (2021 2021 membership)



Logos include: 3iQ, Accelerate, CIBC MELLON, ALIGNVEST, MACKENZIE, claret, FUNDATA, BAItea, COACH HOUSE, ADI, BOOHI, RICHARDSON Wealth, AUM, RANDSON, MAXAM, FORT, ECKLER CRISTALLIN, CASTLEHALL, HORIZON, SIDEL, espresso, CHIMNEY TRUCKER, DALCA, FIRA/CITIZEN, RAYMOND JAMES, MONSIEUR, FORSTRONG, PIPER ROBINSON, TREE CAPITAL, LYXOR, ULLMAN, innocap, Starlight.

CAASA Annual Review 2020
#digitalpivot2020



CAASA Annual Review 2019
Keeping up the pace, adding more everyday



CAASA Annual Review 2018
New beginnings, strengthened relationships



CAASA PARTNERSHIPS

CAIA Association

We partner with many associations, but CAIA is close to our hearts as it is analogous to CAASA (pan-alternative) in the educational realm. All CAASA members have access to the Alternative Analyst Investment Review, CAIA's quarterly digital research digest and enjoy 10% off the CAIA charter exams (excluding the registration fee, about 200 hours of study x 2 levels) and USD200 off CAIA's fundamentals course (approximately 20 hours of study).

The Professional Centre

This serviced office floor is home to the CAASA offices and is available for our events and meetings.

Members looking for flexible, new, and affordable space in the core get an extra discount.



CAASA'S PARTNERSHIPS

Managed Funds Association Partnership Program

Since 2021, we have joined the MFA Partnership Program along with a great many regional alts associations such as: Connecticut Hedge Fund Association, New York Alternatives Roundtable, Palm Beach Hedge Fund Association, South-East Alternative Investment Association, Mid-South Alternative Investment Association, Texas Alts/Alternative Investment Association, CalAlts, and others as added throughout the year.

Unlike our peers which rely on volunteer staff, we do not make use of the MFA's mighty infrastructure to plan our events, but we regularly connect with the MFA and participating associations to better execute on our individual mandates (CAASA's is to bring Canada to the world, and the world to Canada).

Healthy finances allow any organization to run at peak efficiency for all involved. As a non-profit organization, CAASA does not pay income tax, but does remit payroll, sales / HST, and other taxes as required by law. Staff have experience in these processes, which will be overseen by the Member Advisory Panel. An annual audit will be performed, the results and management discussion available to the membership.

CAASA's annual fee schedule was established to be as fair and equitable as possible for all members. Future iterations of the fee schedule will be determined by staff and the MAP and, in some instances, by or with input from broader membership.

Manager AUM will be calculated on alternative AUM including hedge, real estate, private lending, and private equity.

BACK OFFICE

Our Fees and Accounting

Asset Managers (in CAD millions)

<\$50	\$50-\$100	\$100-500	\$500-\$1,000	>\$1,000	Long-only
\$1,500	\$2,500	\$3,500	\$5,000	\$6,000	\$1,450

FEES

Fee Schedule (v2023.1)

Other Members

Prime Brokers, Legal, Admin & Audit	Other Consultants, Exchanges	Wealth Managers & Dealers (50+ reps)	Family Offices, Institutional Investors, & Wealth Managers & Dealers (<50 reps)
\$5,900	\$2,450	\$1,300	\$600

Founders of Start-Ups may join as a corporate unit for \$200 per year. If in a competitive category of endeavour, Founders will be required to upgrade to Consultant or as applicable once out of start-up phase, as determined by CAASA. Founders category not available to Asset Managers.

Fees will be processed as listed plus applicable taxes.

ADDITIONAL FEES/EXPENSES

In addition to annual membership dues

While podcast, webinar, and conference speaking opportunities are without additional cost, members should expect to incur the following expenses associated with being active in the community/events:

- **Conference delegate passes** – these range from \$1,250 to \$2,750 per person (for managers and service providers) for our flagship conferences and usually \$1,000 per person for our other conferences. Some investors might be required to pay an additional fee. Speakers are comp but ALL additional attendees need to have their own delegate pass. Delegate passes purchased within 30 days of a conference date will attract a \$250 per pass processing fee.
- **Conference sponsorship** – in 2024 this is \$5,000 per conference and includes a Table Talk, 1/2-page ad in the program, and additional exposure; a \$3,000 option is available for those who do not want to have lead a Table Talk. Sponsorship DOES NOT influence invitations to speak.
- **Socials** – Most socials have a cost to attend. We find this makes people attend and defrays production costs.
- **Papers & Primers** – We produce 2-4 each year. Cost is \$3,000 per member (4-8 members only) which is allocated to our external writer and printing 1,000 copies to be distributed at our conferences and in info packages (also available online). We invite members to participate in certain ones and are open to suggestions for future topics; all can be found on the Publications page of our website.

MEMBER DIRECTORY

Investors and Allocators

AIMCo
 Aksia LLC
 Albourne Partners
 Alternative Capital Group (MFO)
 Aligned Capital Partners
 Anchor Pacific Investment Management (MFO)
 Artemis Investment Management
 Atlas One Digital Securities
 August Group Captial (MFO)
 Axxess Capital Group
 Barber & Associates (SFO)
 BCI
 BDO Family Office Practice
 bfinance (MFO)
 BGY, Services financiers intégrée
 Blue Bridge Wealth Management (MFO)
 Bodhi Research Group
 Caledon Hills Private Wealth/ IA Private Wealth
 Canaccord Genuity Wealth Management
 Canerector (SFO)
 Capston Asset Management (MFO)
 Chandaria Family Holdings (SFO)
 Cidel (MFO)
 Citi Private Bank
 Defroof Petercam Luxembourg SA
 Designed Securities
 Eckler Ltd.
 Fipke Group
 First Affiliated Holdings (MFO)
 Focus Asset Management (MFO)
 FutureSight Ventures (SFO)
 Gestaly Capital (SFO)
 Guardian Partners Inc
 Harbourfront Wealth Management
 Healthcare of Ontario Pension Plan
 Horizon Capital Holdings (SFO)
 Inverted Ventures (SFO)
 Jisrak Research
 Kinsted Wealth
 Kiwitech (SFO)
 M.Y. Capital Management
 Mandeville Private Client
 Marret Private Wealth
 Master Plan Management (SFO)
 McPike Global Family Office
 Master Plan Management (SFO)
 Mercer Private Wealth
 Mirabaud Asset Management (MFO)
 Morgan Stanley Wealth Management
 Nestive
 Northwood Family Office (MFO)
 Octogone Advisors (Cayman) Limited
 Odlum Brown Limited
 OMERS
 Ontario Teachers' Pension Plan
 OPTrust
 Our Family Office (MFO)
 Pandion Investments Limited
 PBY Capital Ltd.
 PortfolioHiWay
 Prime Quadrant (MFO)
 Raymond James Ltd.
 RBC Dominion Securities
 Richardson Wealth
 Richter Family Office
 Sterling Family Capital Advisors

MEMBER DIRECTORY

Investors and Allocators

Stonehage Fleming (MFO)
University Pension Plan Ontario
The Value Group of Companies (SFO)
Vibrato Capital (SFO)
Wealth Stewards
Wellington Altus
Westcourt Capital Group (MFO)
Westmount Wealth Management
Zen Capital & Mergers (SFO)

MEMBER DIRECTORY

Asset Managers

3iQ Digital Asset Management
Actis
AGF Investments
AGinvest Farmland Properties Canada
Agriroots Capital Management
Algonquin Capital
Alignvest Student Housing
Alphemy Capital
Amur Financial Group
Antrim Investment
AP Capital MIC
Apogem Capital
Apollo Global Capital
AQR Capital Management
Asset Management One
Authentic Asset Management
Avanew Inc.
Avenue Living Asset Management

Avondale Private Capital
Axia Real Assets LP
Benefit Street Partners
BG Wealth
BMO Global Asset Management
Bracebridge Asset Management
Bridgeport Asset Management
Brightspark Ventures
Calvert Home MIC
Cameron Stephens
CanFirst Capital Management
Canyon Partners
Capital Asset Lending
Capital Direct Management Inc.
Capital Fund Management
Celernus Investment Partners
Centurion Asset Management
CF Private Equity
CI Global Asset Management
CIBC Asset Management
Clear Skies Investment Management
Clifton Blake Asset Management
CMCC Global
CMI Financial Group

Cohen & Company Asset Management
Coinbase Asset Management
Conner, Clark & Lunn Funds
Consilium Crypto
Converium Capital
Corton Capital
Creative Ventures
Crystalline Management Inc.
Davidson Kempner Capital Management
DaVinci Capital Partners
Diagram Ventures
Delbrook Capital
Donville Kent Asset Management
Durum Capital
ehp Funds
Episteme Capital Partners
Equiton Capital
Espresso Capital
Farsight Partners
FAX Capital
Federate Hermes
Fidelity Investments Canada ULC
Fiera Capital Corp.
FirePower Capital

MEMBER DIRECTORY

Asset Managers

Firinne Capital SEZC
Firm Capital Corporation
Forum Asset Management
Franklin Templeton Investments
Gentai Capital
Glengarry Farm Finance
Ginkgo MIC
Global X ETFs
Graham Capital Management
Graywood Developments
Greyhill Capital Partners
Harrison Street
Hayfin Capital Management
Hazelview Investments
HGC Investment Management
HighBrook Investors
Highline Beta
Highvista Strategies

iCapital Network
ICICI Bank
Integrity Growth Partners
INP Capital
Integrity Growth Partners
Invesco
JM Fund Management Inc.
Kayne Anderson Capital Partners L.P.
Kirkland Capital Group
Lankin Investments
Leith Wheeler Investment Counsel
Letko Brosseau & Associates
Lexington Partners
LGT Capital Partners
Lombard Odier
Longridge Partners Inc.
Mackenzie Investments
Man Group
Marlin Spring
Marret Asset Management
MarshallZehr Group
Mavrix Private Equity
Maxam Capital Management
Merchant Opportunities Fund

Metori Capital Management
MGG Investment Group
Montrusco Bolton
Morex Capital
Munro Partners
Music Royalties Inc.
Myst Capital Management
New Holland Capital, LLC
Next Edge Capital
Ninepoint Partners LP
Northside Ventures Management
Nymbus Capital
Obsiido
OZ Capital
Panache Ventures
PATRIZIA AG
PenderFund Capital Management
Pershing Square
PHL Capital Corp
Picton Mahoney Asset Management
Plaintext Capital
Plant-E Corp
PlusPlus Capital Management
Position Ventures

MEMBER DIRECTORY

Asset Managers

Quantica Capital AG
QuantZ/QMIT
ReSolve Asset Management
Rise Properties Trust
Robson Capital Management
Roofstock
Sagard Holdings
Sectoral Asset Management
Sentiero Ventures
Skyline Wealth Management
SLGI Asset Management
Spartan Fund Management
ST&T Capital
Stack Capital
Starlight Capital
Steepe & Co. Capital
Straight Line Capital

TerraGen Technology Group Inc.
Three Court.. LP
Timbercreek
Trans-Canada Capital
Travelers Financial Group
Trez Capital
Triovest Realty Advisors
Vesta Wealth Partners
Viewpoint Investment Partners
Virtus Financial Group
WaveFront Global Asset Management
Waypoint Investment Partners
Wealhouse Capital Management
Wealthsimple
Wellington Investments
Westbridge Capital
Whitestone & Co.
Wilshire
XXIII Capital Inc.
YTM Capital Asset Management

MEMBER DIRECTORY

Service Providers

Altrust Investment Solutions
Ange Capital Limited
Apex Fund Services
Aquanow
AUM Law
BAASS Business Solutions Inc.
Battea Class Action Services
BLG LLP
CAIA Association
Capital Markets Outlook Group
Castle Hall Diligence
Caystone Solutions
Cboe Canada
CIBC Mellon
CME Group
Coinsquare
Corpay Cross Border

Federation of Mutual Fund Dealers
FIAM - Forum d'investissement alternatif de
Montréal
Formidium
Fundata
Golden Hawk Financial
Hedgefacts International LLP
Hut 8 Mining
Innocap
IFDS
Introduction Capital
KPMG
Latitude Consultancy
Lerners LLP
Massey Henry
McMillan LLP
MillTechFX
Ndex Systems Inc.
Norton Rose Fulbright
Oak House Advisors
Penrose Partners
Preqin
Prometa Fund Services

RBC Investor Services
Rosseau Immersion
RSM Canada
Sage Software
Sandbox Ltd.
SGGG Fund Services
Sotheby's Fund Services
SS&C Technologies
Stoke Investory Partners Inc.
Tanariva Capital, LLC
Tetra Trust Company
TMX Group
Yardi

MEMBER DIRECTORY

Start-Up Founders

All Y'Alls Foods
Alphablock Technologies
Aquaporin
Aya Payments
BILI Inc. (Because I Love It)
Cansulta
Carmodity Ltd. aka Econommi
Cityzeen
Epsoma, Inc.
FN Immersive Innovation
Going Out And About Inc.
Konfidis
LexiComply
Lockdocs
LUXUS

Parachute
Quantropi
Responsibli
Rondeivu
Snowshow.ai
Tekanism
The S-Factor
Virtual Film School
WeeL

CAREER PANELS & STOCK PITCH CHALLENGE

Career Panels

Panel of 3-5 industry professionals including portfolio managers, operating officers, prime brokers, fund administrators, family office and institutional investor personnel from investment and operational due diligence, as well as other service providers.

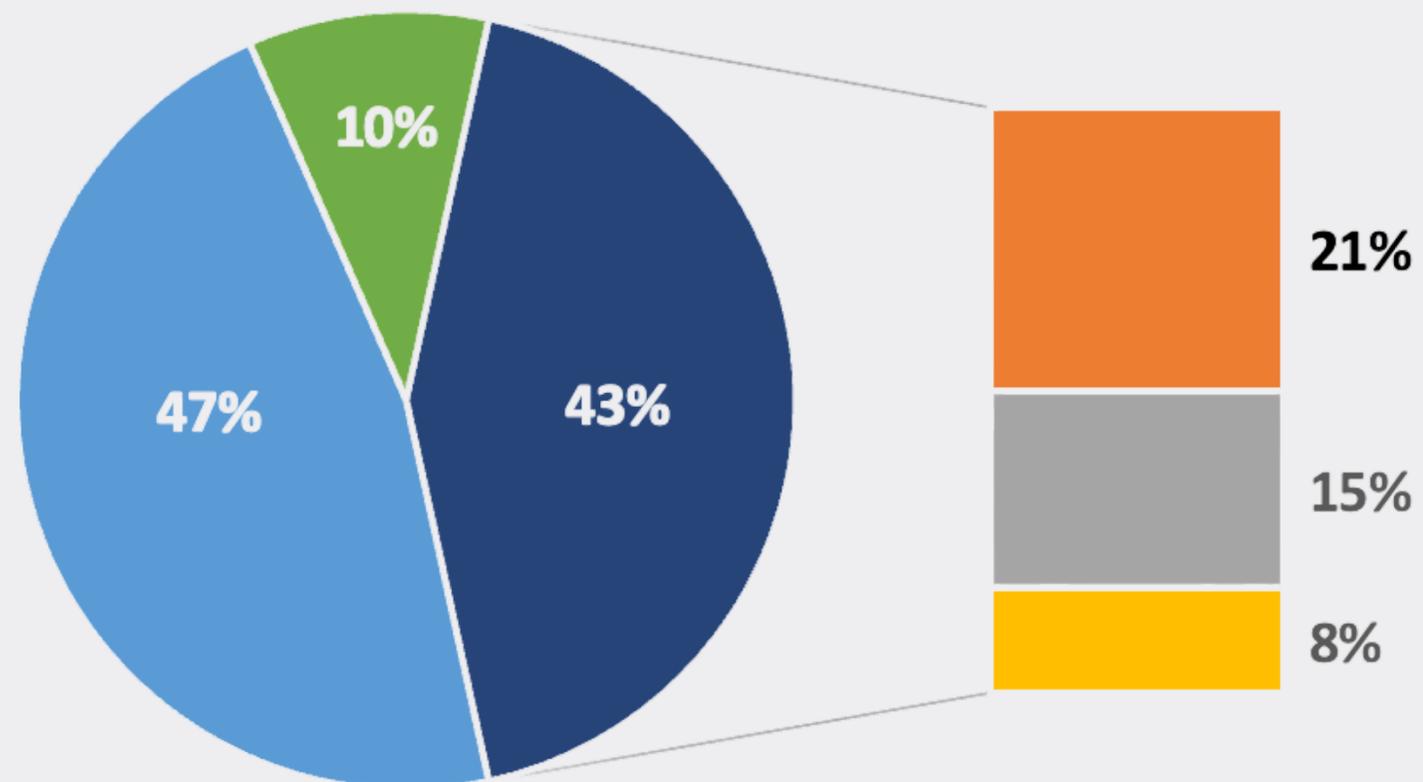
Stock Pitch Challenges

Panels of 3-7 portfolio managers critique student stock (or strategy) pitches. Prizing typically winning team(s) have a night out with 10-20 industry professionals (portfolio managers, investors, and service providers).

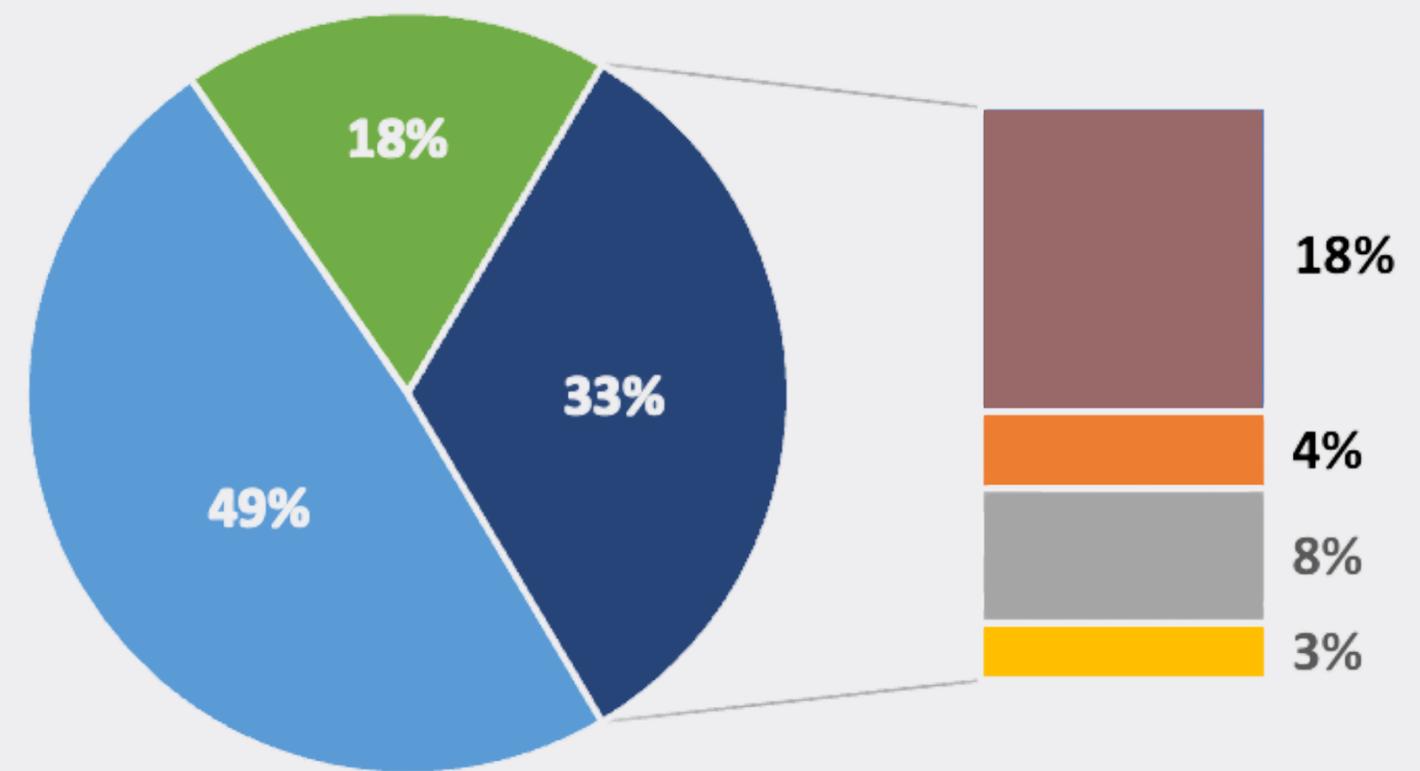
Held at campuses across Canada and Downtown Toronto.

QUALITY CONFERENCE AUDIENCES

Family Office Summit 2023



CAASA Annual Conference 2022



Q1

2024 EVENTS

- Western University - Ivey School of Business Career Panel (Jan 10)
- The Francis Sabourin Hour with Nelson Lam, Trans-Canada Capital (Jan 18)
- University of Toronto Masters of Financial Insurance Career Panel (Feb 5)
- University of Toronto Alternative Investment Club Focus on Private Markets Panel (Feb 8)
- Humber College Careers in Finance (Feb 14)
- The Francis Sabourin Hour with Sean O'Hara with Obsiido (Feb 15)
- Concordia University Kenneth Woods Portfolio Management Program (Feb 20)
- February Networking Night (Feb 28)
- Wealth Managers' Forum (YYZ: March 5; YUL: March 26)
- University of Toronto Scarborough Career Panel (March 6)

Q2

Family Office Summit (Toronto Board of Trade, April 9-10)

The Maple Model on Lac Léman (Geneva, April 23)

Focus on Alternatives - YYC (May 7)

May Networking Night (May 15)

CAASA at the RBC Canadian Open (June 1)

Start-Up Round-Up (June 17)

University of Toronto Masters of Mathematical Finance Career Panel (June 11)

...

more to be added!

2024 EVENTS

2024 EVENTS

Q3

Calgary Stampede Bootlegger's Breakfast (Westin, July 11)
CAASA HedgeFacts Golf Day (Angus Glen G.C., July 18)
July Networking Night (July 17)
11th Annual Méchoui with FIAM (Aug 29)
The Francis Sabourin Hour with Bryan Kelly, AQR (Sept 12)
CAASA Closes the TSX (Sept 14)
September Networking Night (Sept 18)
CAASA Alternative Perspectives: Private Market Focus (Sept 24-25)
Digital Assets Day (Sept 26)

...

more to be added!

2024 EVENTS

Q4

CAASA Annual Conference, Montreal (Nov 12-13)
Holiday Social, Toronto (Dec 3)
Holiday Social with CAIA, Montréal (Dec 12)

...

more to be added!

Q1

2023 EVENTS

Cayman SFO event with Dart Family Office (Jan 10-12)
The Francis Sabourin Hour with Jeff Bradacs, Picton Mahoney Asset Management (Jan 24)
Ontario Ski Day (Jan 26)
Career Showcase (Jan 28)
CAASA Founding Day Drinks (YYZ: Feb 2; YUL: Feb 9)
Wealth Managers' Forum (YVR: Feb 15; YYC: Feb 16; YUL: Feb 21; YYZ: Feb 23)
University of Geneva Career Panel (March 2)
Humber College Career Presentation (March 7)

2023 EVENTS

Q2

The Francis Sabourin Hour with Michael Brutti, Clear Skies Investment Management (March 9)
Alberta Ski Day (April 3)
The Francis Sabourin Hour with Julian Klymochko, Accelerate Financial Technologies (April)
Compliance & Operations Group ft. Stroock & Stroock & Lavan LLP (April 18)
Spring Socials West (YYC: April 18; YVR: April 20)
Family Office Summit (Toronto Board of Trade, April 25-26)
View on Credit & Equity Markets with Richard Pilosof, RPIA & Dave Picton, Picton Mahoney Asset Management (May 2)
The Francis Sabourin Hour with Dennis Mitchell, Starlight Capital (May 10)
The Future of Quant (May 23)
Humber College (Mid-town) Career Panel (May 24)
CAASA Alternative Perspectives (Pan Pacific Hotel, Vancouver, June 5-6)
Start-Up Round-Up YVR (Pender Ventures, Vancouver, June 7)
Simon Fraser University Career Panel (SFU Segal Centre, Vancouver, June 7)
University of Toronto Masters of Mathematical Finance Career Panel (June 15)
Compliance & Operations Group ft. Ogier (June 15)
The Francis Sabourin Hour with Kevin McCreadie, AGF (June 28)

2023 EVENTS

Q3

CAASA Annual Charity Golf Day (Angus Glen G.C., July 7)
Calgary Stampede Bootlegger's Breakfast (Westin, July 11)
Summer Social (Ki Restaurant, Toronto, July 13)
Summer Social (Ki Restaurant, Toronto, August 17)
10th Annual Méchoui with FIAM (Aug 24)
The Francis Sabourin Hour with Bryan Kelly, AQR (Sept 12)
CAASA Closes the TSX (Sept 14)
Summer Social (Ki Restaurant, Toronto, Sept 14)
Start-Up Round-Up Toronto (Highline Beta offices, Sept 26)
Private Equity & Venture Capital Assembly (OMERS offices, Sept 27)
Digital Assets Day (Sept 28)

2023 EVENTS

Q4

University of Toronto Alternative Investment Club Career Panel (Oct 13)
CFA Society of Winnipeg Career Panel (Oct 17)
CAASA Annual Conference, Montreal (Nov 7, 8)
Humber College (Lakeshore Campus) Career Panel (Nov 10)
University of Geneva Career Panel (Nov 29)
Holiday Social with CAIA, Montréal (Dec 5)
Holiday Social, Toronto (Dec 7)

KORIED Trustees Series Conference (Key West Marriott, Jan 16-19)
Apex Invest - The Bahamas (Baha Mar, Jan 21-23)
MFA Network (Miami Beach Lowes, Jan 29 – 31)
Carmo Secondaries (Santa Monica Proper Hotel, Feb 12-13)
Green Summit Wall Street (March 12-13)
ALTSLA (Los Angeles LIVE, March 18-20)
GAIMOps (Grand Cayman, April 14-17)
AIM Summit (London Four Seasons, April 29-30)
Bodhi Research Group Symposium (May 9)
IP&E Pension Risk Toronto (May 14)
Talking Hedge (Austin Omni, May 20-21)
Canadian Annual Derivatives Conference (May 22-23)
Consensus (May 29-31)
Wealth Professional Magazine Awards Gala (Liberty Grand, June 6)
Agecroft - Gaining the Edge (June 17-28 - online)
Calgary Stampede (July 9)
ALTSCHI (July 22-23)

2024 CONFERENCE

Participation/Attendance

NPPFA - National Public Pension Fund Association (Aug 12-13)
ALTSSV (Sept 4-5)
ALTSUK (Sept 19)
ALTSDC (Oct 1)
Apex Invest Las Vegas (Oct 9-10)
ALTSSEA (Oct 16-17)
AIM Summit Dubai (Oct 21-22)
Apex Invest Abu Dhabi (Nov 18-20)
Talking Hedge Nashville (Dec 4-5)
ALTSMIA (Dec 9-11)
Thomas Brigandi Annual Social (Dec 15)

2024 CONFERENCE

Participation/Attendance

KORIED Trustees Series Conference (Key West Marriott, Jan 17-20)
MFA Network (Miami Beach Lowes, Jan 30 – Feb 1)
Carmo Secondaries (Santa Monica Proper Hotel, Feb 27-28)
Can-TX Chamber Economic Forecast (Dallas The Henry, March 21)
ALTSLA (Los Angeles LIVE, March 27-29)
Talking Hedge (Austin Onmi, March 28-29)
Group RMC Canadiens Game (Montreal, March 30)
AIM Summit (London Four Seasons, April 13-14)
MFA Global Conference (The Bristol, Paris, May 16)
Irish Funds Conference (Dublin Royal Convention Centre, Dublin, May 18)
Wealth Professional Magazine Awards Gala (Liberty Grand, June 1)
Talking Hedge Toronto (Omni King Edward, June 13-14)
Dialogue Global Infrastructure & Energy Summit (Frankfurt, June 15-16)
PDI Japan Korea (Seoul, June 26; Tokyo, June 28)
Dialogue Global Infrass & Energy Summit (Sofitel Opera, Frankfurt, June 15-16)
Canada-Texas Venture Capital Networking Reception (Toronto, June 27)
Blockchance 2023 (Hamburg Convention Centre, June 27-29)

2023 CONFERENCE

Participation/Attendance

Calgary Stampede (July 11)
TIDE SPARK Laguna Beach (July 12-13)
ALTSCHI (July 17-18)
KORIED at The Biltmore (July 19-20)
Futurist Conference (August 15-16)
ALTSSV (Sept 6-7)
GAIMOps West (Sept 11-13)
Greenwich Economic Forum (Oct 3-4)
Talking Hedge - Marina del Rey (Oct 17-18)
ALTSSEA (Oct 19-20)
ALTSUK (Oct 25-26)
AIM Summit (Oct 30-31)
CAIA Miami Event (Nov 15)
Thomas Brigandi Annual Social (Dec 17)

2023 CONFERENCE

Participation/Attendance



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