



**CAASA**  
CANADIAN ASSOCIATION OF  
ALTERNATIVE STRATEGIES & ASSETS

# CAASA'S 2025 PLANNING DOCUMENT

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



# ABOUT CAASA



## INCLUSIVE, ACTIVE, & PAN-ALTERNATIVE

The Canadian Association of Alternative Strategies & Assets (CAASA) was created in response to industry requests for a national group to represent the Canadian alternative investment participants, including investors, asset managers, and service providers. CAASA is inclusive in that it welcomes participation from all companies active in the space as well as select individuals (those with investors) who might want to participate in committees and working groups – or simply attend member events – without their employer being a member of the association. CAASA is very active in both committees & groups and events: at least seven conferences are planned in 2025. Pan-alternative, for CAASA, encompasses all alternative strategies and assets including: hedge funds / alternative trading strategies, private and public real estate (funds and direct), private lending, private equity, development & project finance, digital assets / crypto-assets, weather derivatives & cat bonds, and all aspects of diligence, trading, structuring, dealing, and monitoring alternatives in a stand-alone portfolio and as part of a larger investment strategy.

## MEMBER BENEFITS

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

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

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

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

## NATIONAL AND GLOBAL

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

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

# OUR MEMBERSHIP

## WE HAVE AN ALL-YEAR MEMBERSHIP DRIVE

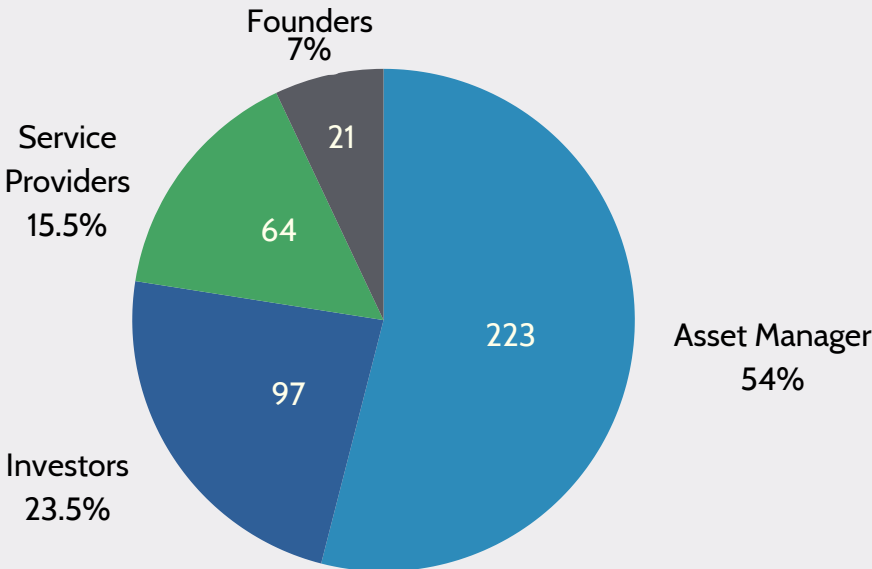
Over the last year we have exceeded our expectations for membership growth, which actually now stands at 420 members and with a fairly steady composition of ~25% investors, ~50% managers from all types of shops running many diverse alternative assets & strategies, and ~20% service providers - plus 21 start-up founders who may represent the next big companies in the world.



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

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

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





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

# SPONSORSHIP OPPORTUNITIES - 2024

<a href="#">PAGE 12</a>	<b>CAASA ANNUAL CONFERENCE</b> \$3,000 - \$5000	<b>MONTREAL</b> November 12-13, 2024	Flagship Conference
This conference brings institutional investors from across the globe focusing on key issues facing investors and managers in Canada and elsewhere.			
<a href="#">PAGE 9</a>	<b>DIGITAL ASSETS &amp; BLOCKCHAIN DAY</b> \$2,000+	<b>TORONTO</b> September 24, 2024	Thematic Conferences
This conference brings institutional investors from across the globe focusing on key issues facing investors and managers in Canada and elsewhere.			
<a href="#">PAGE 10</a>	<b>CAASA ALTERNATIVE PERSPECTIVES</b> \$2,000+	<b>TORONTO</b> September 25, 2024	
This conference will bring together managers, service providers, and global allocators in the real assets and lending space.			
<a href="#">PAGE 11</a>	<b>VANCOUVER LIQUIDITY EVENT 2024</b> \$1,000 - \$2000	<b>VANCOUVER</b> October 15, 2024	
This afternoon of alternatives is designed to educate attendees on the basics of liquid and illiquid investments.			
<a href="#">PAGE 28</a>	<b>SEPTEMBER NETWORKING NIGHT</b> \$1,000+	<b>TORONTO</b> September 18, 2024	Social Sponsorships
<a href="#">PAGE 28</a>	<b>HOLIDAY SOCIAL 2024</b> \$1,500+	<b>TORONTO</b> November 26, 2024	
<a href="#">PAGE 28</a>	<b>CAASA, CAIA, EMB, AND AIMA HOLIDAY SOCIAL</b>	<b>MONTREAL</b> December 11, 2024	
<a href="#">PAGE 29</a>	<b>PAPERS / PRIMERS</b> \$3,000+	<b>H2 MEMBERSHIP DIRECTORY - OCT 1ST PRINT DATE</b> \$1000+	Other Opportunities
		<a href="#">VIEW H1 MEMBERSHIP DIRECTORY</a>	

## Special Thanks to our 2024 Gold Partners





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

# SPONSORSHIP OPPORTUNITIES – 2025

**PAGE 5**

## CAASA 2025 GOLD PARTNER

\$30,000

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

**PAGE 6**

## CAASA 2025 PLATINUM PARTNER

\$50,000

In addition to the Gold Partner benefits, our Platinum Partner will see their own independent banner at all conferences and in-person events, logo displayed on homepage of our the website, and highlighted independently on our conference event pages, discounted pricing, and much more!

**Partnership Package Opportunities**

**PAGE 14**

## FAMILY OFFICE SUMMIT

\$3,000+

**TORONTO**

April 23-24, 2025

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

**PAGE 17**

## CAASA ANNUAL CONFERENCE

\$3,000+

**MONTREAL**

November 4-5, 2025

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

**Flagship Conferences**

**PAGE 13**

## WEALTH MANAGERS' FORUM

\$2,000+

**TORONTO**

March 27, 2025

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

**PAGE 15**

## DIGITAL ASSETS DAY

\$2,000+

**TORONTO**

September 24, 2025

This conference will bring together managers, service providers, and global allocators in the real assets and lending space.

**Thematic Conferences**

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## CAASA ALTERNATIVE PERSPECTIVES

\$2,000+

**TORONTO**

September 25, 2025

This conference will bring together managers, service providers, and global allocators in the real assets and lending space.

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## FALL, SUMMER & WINTER NETWORKING NIGHTS

\$1,000+

**TORONTO &**

**MONTREAL**

**Social Sponsorships**

**PAGE 29**

## PAPERS / PRIMERS

\$3,000+

## MEMBERSHIP DIRECTORY

\$1000+

**Other Opportunities**

# CAASA 2025 GOLD PARTNER



**Our 2025 Gold Partner package is designed for members who are active (or about to be!) and desire a more all-inclusive billing and offering experience. These members receive:**

- Sponsorship & 3 delegate passes at any three of our conferences:
  - Wealth Managers' Forum (Toronto - February 27, 2025)
  - Family Office Summit (Toronto - April 23-24, 2025) [Flagship]
  - Digital Assets Day (Toronto - September, 2025)
  - CAASA Alternative Perspectives: Private Market Focus (Toronto - September, 2025)
  - CAASA Annual Conference (Montréal - November 4-5, 2025) [Flagship]
- \$5,000 discount to be a conference Title Sponsor (Page 7)
- Branding at all conferences via Gold Partner banner
- Complimentary sponsorship & 3 passes for our Founding Day Drinks and numerous Networking Nights & Holiday Socials (value of \$5,000+)
- Next call (in order of commitment date) on our additional exposure items (listed on page 21)
- Next call (in order of commitment date) on enhanced exposure items (listed on page 22) for the stated additional fees
- 10% off sponsorship of our CAASA papers and primers initiated in 2025

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

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

**Package valued at \$40,000**

Gold Partners are next in line (after our Platinum Partner) for spots at all of our in-person events in 2025 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees, but can be as few as 100 attendees) and we reserve at least 40% of tickets for investors (such as pensions and single family offices) leaving, at most, 150 tickets for our manager and service provider members which number more than 300 corporate entities. Gold Partners have a guaranteed three passes per chosen conference (non-transferrable between conferences).

## Special Thanks to our 2024 Gold Partners



CapitalDirect  
Let your house lend a hand.

CIBC MELLON



hazelview  
INVESTMENTS



HGC INVESTMENT MANAGEMENT INC.

iCapital

MGG  
INVESTMENT GROUP

TCC  
TRANS-CANADA CAPITAL

Wilshire

# CAASA 2025 PLATINUM PARTNER

Our 2025 Platinum Partner package is meant for those who wish to get the most exposure possible from our audience. Not only will our Platinum Partner be featured prominently at all of our conferences, but will be highlighted independently on our website, and wherever a CAASA banner is present (globally!).

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



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

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

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

Package valued at \$90,000



Our Platinum Partner is first in line for spots at all of our in-person events in 2025 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees, but can be as few as 100 attendees) and we reserve at least 40% of tickets for investors (such as pensions and single family offices) leaving, at most, 150 tickets for our manager and service provider members which number more than 300 corporate entities. Our Platinum Partner has a guaranteed three passes per chosen conference (non-transferrable between conferences).



# SPONSORSHIP LEVELS

## MEMBERS ASK - WE DELIVER

We strive to deliver the most compelling conferences & events, inspired by your feedback. Elevate your event experience, and join us in 2025 as we unveil a new range of sponsorship opportunities, tailored to meet our members' needs and provide the exposure levels they are seeking.



### 2025 Platinum Sponsor

Offers your company the highest level of visibility and be exclusively showcased at each CAASA event we host in 2024. In addition to all the benefits featured in the Gold Sponsor package, our Platinum Sponsor receives an exhibit booth (valued at \$2,000), has a first call on all additional and enhanced sponsor items (see page 21 & 22 respectively) at each of their chosen conferences, and has a comp opportunity to be Title Sponsor at one of our 2025 events.

### Conference Title Sponsor

Each CAASA conference, summit and forum will feature a single Title Sponsor. Title Sponsors receive all the benefits from the Gold Sponsor package, plus recognition as program sponsor, having their logo showcased on the program front cover along with a full-page advertisement on the back cover. Additionally, a two-page spread inside the program, and excellent visibility to all attendees as the conference messaging & meeting app sponsor. As the app sponsor, your corporate logo will be displayed on the splash screen every time a user accesses the platform (mobile and desktop), and on each email sent to delegates via the app. Title Sponsors also receive second call on additional and enhanced sponsor items (see page 21 & 22 respectively).

### 2025 Gold Sponsors

2025 Gold Sponsors will be highlighted together at every conference and event, CAASA hosts in 2025. In addition to the benefits offered through a Silver Sponsorship package, members of this level will receive third call on all enhanced sponsor items (see page 21 & 22 respectively), along with a full-page advertisement in the relevant conference program. Gold Sponsors will also be provided a discounted price to be a Title Sponsor for the conference, if available.

### Conference Silver Sponsor

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

### Conference Bronze Sponsor

Sponsors of this package will be provide a ½-page advertisement in the printed conference program; logo placement on the event page, all marketing collaterals and at the conference venue; complimentary sponsor item and be provided the opportunity to purchase enhanced sponsor items (see page 21 & 22 respectively).

# SPONSORSHIP LEVELS

Complimentary Booth at all CAASA conferences attended					
Plantinum Sponsor banner at all 2025 CAASA events					
Gold Sponsor banner at all 2025 CAASA events					
One Complimentary Title Sponsorship					
Discounted Title Sponsorship			25 - 50% Disc		25-50% Disc
Program Sponsor with logo on front cover and full page advertisement on back cover					
Two Page Spread Advertisement					
Additional Full Page Advertisement	\$1,000	\$1,000			
Table Talk - Host Two 25 minute sessions					
Opportunity to purchase enhanced sponsor items (page 17)					
Complimentary additional sponsor item (page 16)					
Logo placement on the event page, marketing emails, and at the conference venue					
1/2 page advertisement in the printed conference program					
	Bronze	Silver	2025 Gold	Title	2025 Platinum

# DIGITAL ASSETS AND BLOCKCHAIN DAY 2024

SEPTEMBER 24, 2024 - TORONTO

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

## SELECT 2024 DISTINGUISHED SPEAKERS



**STEVEN D'MELLO**  
ALBOURNE PARTNERS



**RUAIRI HANAFIN**  
FIRINNE CAPITAL



**SHAUN MARTINAK**  
COINBASE ASSET  
MANAGEMENT



**PASCAL ST-JEAN**  
3IQ CORP.



**RAHUL MEHTA**

## DELEGATE REGISTRATION FEES

Investor

Complimentary

Members of CAASA  
Asset Manager & Service Providers

\$250 (+ tax) per delegate

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

[View 2024 Event Page](#)

Special Thanks to our 2024 Title Sponsor





# CAASA ALTERNATIVE PERSPECTIVES: PRIVATE MARKET FOCUS 2024

SEPTEMBER 25, 2024 - TORONTO

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

	Pricing	<p>CAASA is proud to offer this new conference in 2024!</p>
Bronze Sponsor	\$2,000	
Silver Sponsor	\$3,500	
Title Sponsor	\$10,000 \$5,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor	

## DELEGATE REGISTRATION FEES

Investor	Complimentary
<u>Members of CAASA</u> Asset Manager & Service Providers	\$1,000 (+ tax) per delegate

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

[View 2024 Event Page](#)

## Special Thanks to our 2024 Event Sponsors



GLOBAL ASSET  
MANAGEMENT



hazelview  
INVESTMENTS

iCapital

# VANCOUVER LIQUIDITY EVENT 2024

OCTOBER 15, 2024

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

	Pricing
Bronze Sponsor	\$2,000
Silver Sponsor	\$3,500
Title Sponsor	\$10,000 \$5,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor



## DELEGATE REGISTRATION FEES

Investor	Complimentary
Members of CAASA Asset Manager & Service Providers	\$50 (+ tax) per delegate
Non-members of CAASA Asset Manager & Service Providers	\$75 (+ tax) per delegate

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

[View 2024 Event Page](#)

## Special Thanks to our 2024 Event Sponsors

mcmillan



CapitalDirect™

Let your house lend a hand.

ICM

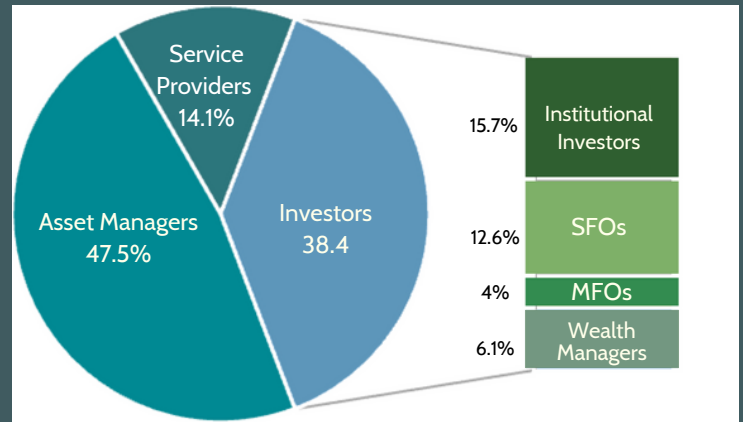
ASSET  
MANAGEMENT

# CAASA ANNUAL CONFERENCE 2024

NOVEMBER 12-13, 2024 - MONTRÉAL

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

	Pricing
Bronze Sponsor	\$3,000
Silver Sponsor	\$5,000
Title Sponsor	\$20,000 \$15,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor



[click here for the delegate list](#)

## DELEGATE REGISTRATION FEES

Price increases by \$250 on Oct 15, 2024

Single Family Offices (including non-members)	Complimentary	Asset Managers: <50 Million AUM	\$1,250 (\$1,500 after Oct 15)
Investment Advisors	Complimentary	Asset Managers: 50 - 500 Million AUM	\$1,750 (\$2,000 after Oct 15)
Intermediary Investor/Consultant +1	\$160	Asset Managers: 500 - 1,000 Million AUM	\$2,250 (\$2,500 after Oct 15)
Ancillary Service Provider	\$1,750 (\$2,000 after Oct 15)	Asset Managers: >1 Billion AUM	\$2,750 (\$3,000 after Oct 15)
Core Service Provider	\$2,750 (\$3,000 after Oct 15)		

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

[View 2023 Program](#)

[View 2024 Event Page](#)

[View 2023 Event Page](#)

LYXOR  
Asset Management

CIBC MELLON

GROUP RMC

HEDGEFACTS  
OUTSOURCED OPERATIONS SOLUTIONS

PREQIN

HGC INVESTMENT MANAGEMENT INC.

CAMERON  
STEPHENS  
MORTGAGE CAPITAL

CFM  
INSIGHT.DATA.CLARITY.

SigmaSandbox

ROMSPEN  
POLYMATH

CLIFTON BLAKE

MGG  
INVESTMENT GROUP

AgriRoots  
DIVERSIFIED LENDING FUND LP/TRUST

Farm  
Lending  
Canada

CROSS OCEAN  
PARTNERS

METORI  
Capital Management

Connect  
PATRIZIA



Thank you to our  
past Sponsors

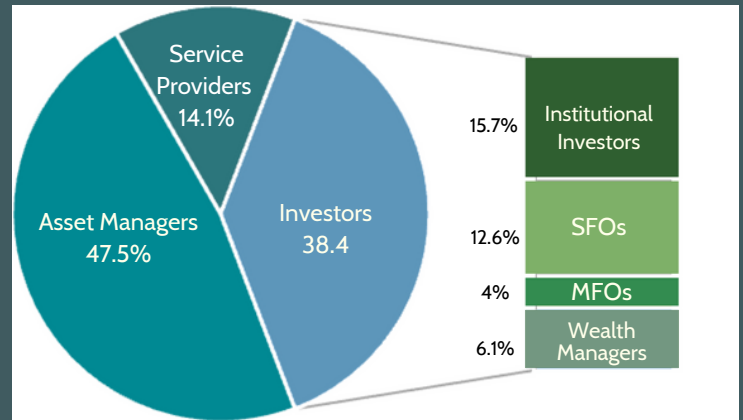


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	Pricing
Bronze Sponsor	\$3,000
Silver Sponsor	\$5,000
Title Sponsor	\$20,000 \$15,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor



[click here for the delegate list](#)

## DELEGATE REGISTRATION FEES

Single Family Offices (including non-members)	Complimentary	Asset Managers: <50 Million AUM	\$1,500
Investment Advisors	Complimentary	Asset Managers: 50 - 500 Million AUM	\$2,000
Intermediary Investor/Consultant +1	\$160	Asset Managers: 500 - 1,000 Million AUM	\$2,500
Ancillary Service Provider	\$2,000	Asset Managers: >1 Billion AUM	\$3,000
Core Service Provider	\$3,000		

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

[View 2023 Program](#)

[View 2024 Event Page](#)

[View 2023 Event Page](#)

LYXOR  
Asset Management

CIBC MELLON

GROUP RMC

HEDGEFACTS  
OUTSOURCED OPERATIONS SOLUTIONS

PREQIN

HGC INVESTMENT MANAGEMENT INC.

CAMERON  
STEPHENS  
MORTGAGE CAPITAL

CFM  
INSIGHT.DATA.CLARITY.

SigmaSandbox

ROMSPEN  
POLYMATH

CLIFTON BLAKE

MGG  
INVESTMENT GROUP

AgriRoots  
DIVERSIFIED LENDING FUND LP/TRUST

Farm  
Lending  
Canada

CROSS OCEAN  
PARTNERS

METORI  
Capital Management

Connect  
HEDGEFUND INVESTMENT CORPORATION

PATRIZIA



Thank you to our  
past Sponsors

# WEALTH MANAGERS' FORUM 2025 - YYZ

MARCH 27, 2025 - TORONTO

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

	Pricing													
Bronze Sponsor	\$2,000	<table><tr><td>Asset Managers</td><td>54.1%</td></tr><tr><td>Investors</td><td>38.5%</td></tr><tr><td>Service Providers</td><td>7.4%</td></tr><tr><td>Wealth Managers</td><td>25.7%</td></tr><tr><td>SFOs</td><td>4.1%</td></tr><tr><td>MFOs</td><td>8.8%</td></tr></table>	Asset Managers	54.1%	Investors	38.5%	Service Providers	7.4%	Wealth Managers	25.7%	SFOs	4.1%	MFOs	8.8%
Asset Managers	54.1%													
Investors	38.5%													
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SFOs	4.1%													
MFOs	8.8%													
Silver Sponsor	\$3,000													
Title Sponsor	\$5,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor	<a href="#">click here for the delegate list</a>												

## DELEGATE REGISTRATION FEES

Price increases by \$250 on March 6th, 2025

Investors

Complimentary

Members of CAASA  
Asset Manager & Service Providers

\$1,000

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

[View 2024 Program](#)

[2025 Event Page](#)



CLIFTON BLAKE



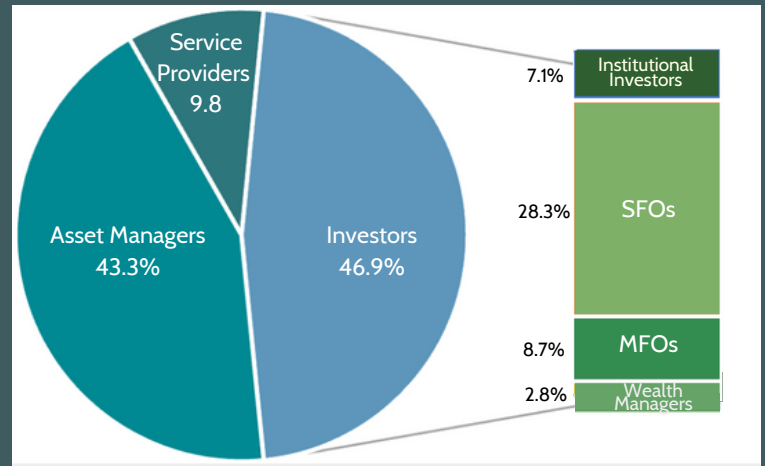
Thank you to our  
past Sponsors

# FAMILY OFFICE SUMMIT 2025

APRIL 23-24, 2025 - TORONTO

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

	Pricing
Bronze Sponsor	\$3,000
Silver Sponsor	\$5,000
Title Sponsor	\$20,000 \$15,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor



[click here for the delegate list](#)

## DELEGATE REGISTRATION FEES

Single Family Offices (including non-members)	Complimentary	Asset Managers: <50 Million AUM	\$1,250 (\$1,500 after March 24)
Investment Advisors	Complimentary	Asset Managers: 50 - 500 Million AUM	\$1,750 (\$2,000 after March 24)
Intermediary Investor/Consultant +1	\$160	Asset Managers: 500 - 1,000 Million AUM	\$2,250 (\$2,500 after March 24)
Ancillary Service Provider	\$1,750 (\$2,000 after March 24)	Asset Managers: >1 Billion AUM	\$2,750 (\$3,000 after March 24)
Core Service Provider	\$2,750 (\$3,000 after March 24)		

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

[View 2024 Program](#)

[View 2024 Event Page](#)

[View 2025 Event Page](#)



Thank you to our past Sponsors

# DIGITAL ASSETS DAY 2025

SEPTEMBER 17, 2025 - TORONTO

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

## 2024 DISTINGUISHED SPEAKERS



**STEVEN D'MELLO**  
ALBOURNE PARTNERS



**RUAIRI HANAFIN**  
FIRINNE CAPITAL



**SHAUN MARTINAK**  
COINBASE ASSET  
MANAGEMENT



**PASCAL ST-JEAN**  
3IQ CORP.



**RAHUL MEHTA**

## DELEGATE REGISTRATION FEES

**Investor**

**Complimentary**

Members of CAASA  
**Asset Manager & Service Providers**

**\$250 per delegate**

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

[View 2024 Event Page](#)

[View 2025 Event Page](#)

**Special Thanks to our 2024 Title Sponsor**





# CAASA ALTERNATIVE PERSPECTIVES: PRIVATE MARKET FOCUS 2025

SEPTEMBER 18, 2025 - TORONTO

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

	Pricing
Bronze Sponsor	\$2,000
Silver Sponsor	\$3,500
Title Sponsor	\$10,000 \$5,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor



## DELEGATE REGISTRATION FEES

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

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

[View 2024 Event Page](#)

[View 2025 Event Page](#)

## Special Thanks to our 2024 Event Sponsors



GLOBAL ASSET  
MANAGEMENT



hazelview  
INVESTMENTS



CapitalDirect™  
Let your house lend a hand.

iCapital.

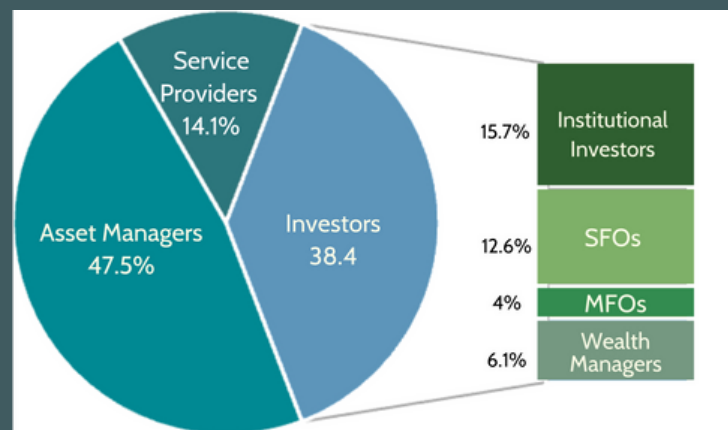
PREQIN

# CAASA ANNUAL CONFERENCE 2025

NOVEMBER 4-5, 2025 - MONTRÉAL

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

	Pricing
Bronze Sponsor	\$3,000
Silver Sponsor	\$5,000
Title Sponsor	\$20,000 \$15,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor



[click here for the delegate list](#)

## DELEGATE REGISTRATION FEES

Price increases by \$250 on October 5, 2025

Single Family Offices (including non-members)	Complimentary	Asset Managers: <50 Million AUM	\$1,250 (\$1,500 after Oct 5)
Investment Advisors	Complimentary	Asset Managers: 50 - 500 Million AUM	\$1,750 (\$2,000 after Oct 5)
Intermediary Investor/Consultant +1	\$160	Asset Managers: 500 - 1,000 Million AUM	\$2,250 (\$2,500 after Oct 5)
Ancillary Service Provider	\$1,750 (\$2,000 after Oct 5)	Asset Managers: >1 Billion AUM	\$2,750 (\$3,000 after Oct 5)
Core Service Provider	\$2,750 (\$3,000 after Oct 5)		

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

[View 2023 Program](#)

[View 2024 Event Page](#)

[View 2025 Event Page](#)



Thank you to our  
past Sponsors

# COMPLIMENTARY SPONSOR EXPOSURE ITEMS

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

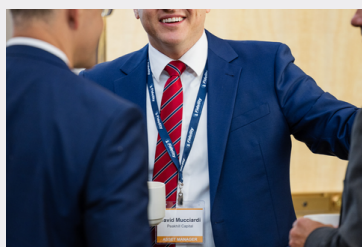
These exposure items are apportioned on a first-come basis to members as they commit to sponsoring the event. Platinum Sponsors have first call on any remaining item from when they commit to that level of sponsorship and Gold Sponsors have next call on any remaining item once Platinum Sponsors have had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

When a speaker might be keynote during a meal, sponsorship does not include any sort of speaking (intro, thanks, moderation, nor presentation) by the member. Their attachment to the timing will be mentioned and, as applicable, acknowledged visually but that is it.

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



**Meals & Breaks**



**Lanyards (provided by sponsor)**



**Phone Chargers (stickers provided by sponsor)**



**Evening Reception**



**Tête-à-têtes  
And More....**



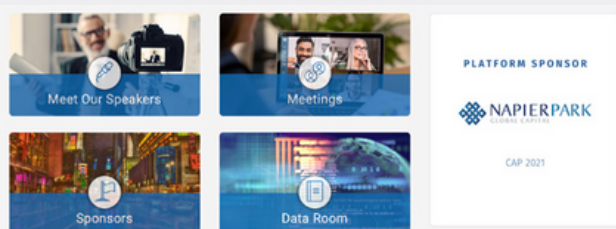
# ENHANCED SPONSOR EXPOSURE ITEMS

## A Plethora of Sponsorship Opportunities



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

- **Hotel keycards (CAASA Annual Conference):**  
usually  
\$1,500 for the keycard logo placement + \$500 for  
keycard protective sleeve logo placement
- **Program (logo on cover page):** \$1,500 per  
conference
- **Meeting platform (logo on each login page and  
emails):** \$3,000 per conference
- **Espresso coffee bar & barista (including logo  
placement on froth):** TBD; likely \$3,000
- **Others as they present themselves...**



## Meeting Platform (\$3,000)



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



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

## Booth (\$2,000)

**And More....**

## Program (\$1,500)



# CAASA ANNUAL CONFERENCE 2023

## DELEGATE LIST (1/2)

210 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 15 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 40% INVESTORS, 45% MANAGERS, 15% SERVICE PROVIDERS

- Addenda Capital
- Algonquin Capital
- Alphemy Capital
- Amundi Asset Management
- AP Capital Mortgage Investment Corporation
- Asset Management One International Ltd.
- Avenue Living Asset Management
- Axonic Capital LLC
- Bimcor
- BNY Mellon Asset Management
- Bodhi Research Group
- Bonnefield Financial
- CAAT Pension Plan
- Caisse de dépôt et placement du Québec
- Caledon Hills Private Wealth/IA Private Wealth
- Cameron Stephens Mortgage Capital Ltd
- Cannect Mortgage Investment Corporation
- Canyon Partners LLC
- Capital Fund Management
- Capital Markets Outlook Group, Inc.
- Centurion Asset Management
- CI Global Asset Management
- CIBC Mellon Global Securities Services Company
- City of Montréal
- Clifton Blake Asset Management
- CN Investment Division
- Converium Capital
- CPP Investments
- Cross Ocean Partners
- Crystalline Management Inc.
- Cross Ocean Partners
- Crystalline Management Inc.
- Davidson Kempner Capital Management LP
- Delbrook Capital
- Durum Capital Inc
- Episteme Capital Partners
- Equiton Inc.
- Farm Lending Canada
- Farsight Partners
- Federated Hermes
- FIAM
- Fieldhouse Capital Management
- Fiera Capital
- Financière des professionnels
- Franklin Templeton Investments
- General Motors Asset Management (GMAM)
- Graham Capital Management, L.P.
- Group RMC
- Hamilton Lane
- Hayfin Capital Management
- Healthcare of Ontario Pension Plan (HOOPP)
- Hedgefacts International LLP
- HGC Investment Management Inc
- HighBrook Investors
- Hydro-Québec
- IA Wealth Management
- IMCO
- Integrity Growth Partners
- International Financial Data Services (IFDS)

# CAASA ANNUAL CONFERENCE 2023

## DELEGATE LIST (2/2)

210 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 15 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 40% INVESTORS, 45% MANAGERS, 15% SERVICE PROVIDERS

- Invesco
- Invico Capital Corporation
- K2 Advisors
- KV Capital
- Letko, Brosseau & Associates Inc.
- LodeRock Advisors Inc.
- Louisiana School Employees' Retirement System
- MarshallZehr Group
- McGill Offices of Investments
- Metori Capital Management
- MGG Investment Group
- Mirabaud
- Montrusco Bolton Investments
- MSCI
- Music Royalties Inc
- New Holland Capital, LLC
- Northland Wealth Management
- Norton Rose Fulbright
- Nvestiv
- Nymbus Capital
- Oak House Advisers
- Octogone Advisors (Cayman) Limited
- Ontario Teachers' Pension Plan
- OPTrust
- PaceZero Capital Partners Ltd.
- Panache Ventures
- PATRIZIA AG
- PenderFund Capital Management
- Pershing Square Capital Management, L.P.
- Pictet Asset Management
- Pinnacle Investment Management
- Plus Plus Capital Management
- Polymath
- Preqin
- Prime Quadrant
- PSP Investments
- Quantica Capital AG
- QuantZ
- Raymond James Ltd
- ReSolve Asset Management
- Richardson Wealth
- Richter Family Office
- Rise Properties Trust
- Romspen Investment Corporation
- RPIA
- RRCPE GQ
- RSM
- Sagard Holdings
- SigmaSandbox
- Steepe & Co. Ltd.
- Stormont Partners
- Tailwind Capital
- TD Prime Services
- TerraGen Technology Group Inc.
- The World Bank
- Timbercreek Asset Management
- Trans-Canada Capital
- United Nations Joint Staff Pension Fund (UNJSPF)
- University Pension Plan Ontario
- Virgo Asset Management
- Wellington-Altus
- Westbridge Capital
- Whitestone & Co.
- YTM Capital Asset Management

# FAMILY OFFICE SUMMIT 2024

## DELEGATE LIST (1/3)

218 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 63 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 40% INVESTORS (40+ SFOS, 50 FROM MFOS), 50% MANAGERS, 10% SERVICE PROVIDERS.

- 3iQ Corp.
- AGF Investments
- AGinvest Farmland Properties Canada
- AKS Family Partners
- Aksia LLC
- Albourne Partners
- Allied Capital Corporation
- Amur Financial Group
- Ange Capital Limited
- Apogem Capital
- Apollo Global Management
- Artemis Investment Management
- Asset Management One USA
- August Group
- Avaneu
- Avaneu Inc.
- Avondale Private Capital
- BDO Family Office
- BFinance Inc
- BGY, Services financiers intégrés
- BlueSky Investment Counsel
- BMO Global Asset Management
- Bodhi Research Group
- Brightspark Ventures
- Canadian Urban Limited
- CanFirst Capital Management
- Capital Asset Lending Inc.
- Capital Direct Management Ltd.
- Capital Fund Management
- Caystone Solutions Ltd.
- CF Private Equity
- CI Global Asset Management
- Cidel
- Citi Private Bank
- Clifton Blake Asset Management
- Cohen & Company Asset Management
- Coinbase Asset Management
- Converium Capital
- Corpay
- Degroof Petercam Luxembourg
- Delbrook Capital
- Designed Securities Ltd.
- Durum Capital Inc
- DXM Capital Advisors LLC
- Farm Lending Canada
- Federated Hermes
- Fidelity Investments Canada ULC
- Fiera Capital
- FirePower Capital
- Firm Capital
- First Affiliated Holdings
- Frankforter Group
- Franklin Templeton
- Gentai Capital Corporation
- Grayhawk Wealth
- Graywood Developments LP
- Hazelview Investments
- Hedgefacts International LLP
- HGC Investment Management Inc
- HighVista Strategies
- iCapital Network
- INP Capital
- Integrity Growth Partners

# FAMILY OFFICE SUMMIT 2024

## DELEGATE LIST (2/3)

224 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 63 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 40% INVESTORS (40+ SFOS, 50 FROM MFOS), 50% MANAGERS, 10% SERVICE PROVIDERS.

- Invesco
- Jisrak
- Kayne Anderson Capital
- Kayne Partners
- Kirkland Capital Group
- KJ Harrison Investors
- KPMG
- Lankin Investments
- Leith Wheeler Investment Counsel Ltd.
- Lerner LLP
- Letko, Brosseau & Associates Inc.
- LGT Capital Partners
- Lighthouse Funds
- Lombard Odier Investment Management
- Longridge Partners Inc.
- Man Group
- MarshallZehr Group
- Mercer Private Wealth
- Metori Capital Management
- Mirabaud
- MSC Cruises (Canada) Ltd
- Music Royalties Inc
- Ndex Systems Inc.
- Ninepoint Partners LP
- Northside Ventures
- Northwood Family Office
- Nour Private Wealth Inc.
- Oak House Advisers
- Odium Brown Limited
- OSF Partners
- Our Family Office Inc
- OZ Capital
- Panache Ventures
- PBY Capital Ltd.
- Penderfund Capital Management Ltd.
- Penrose Partners
- Pershing Square Capital Management
- Picton Mahoney Asset Management
- Pinnacle Investment Management
- Plaintext Capital
- PortfolioHiWay
- Position Ventures
- Prime Quadrant
- QuantZ/ QMIT
- Raymond James Ltd
- RBC Dominion Securities
- RBC Investor Services
- Richardson Wealth
- Richter Family Office
- Rise Properties Trust
- Rondeivu, Inc.
- Roofstock
- Rosseau Group International Inc.
- Sagard
- Sage Software
- Sandbox Limited
- Sectoral
- Sentiero Ventures
- Sotheby's International Realty Canada
- Steepe & Co. Ltd.
- Sterling Family Capital Advisors
- Stonehage Fleming
- Straight Line Capital Corp
- Tanariva Capital



# FAMILY OFFICE SUMMIT 2024

## DELEGATE LIST (3/3)

224 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 63 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 40% INVESTORS (40+ SFOS, 50 FROM MFOS), 50% MANAGERS, 10% SERVICE PROVIDERS.

- TerraGen Technology Group Inc.
- Tetra Trust Company
- Three Court LP
- Trans-Canada Capital Inc
- Trez Capital
- Triovest Realty Advisors
- Veritable Wealth Advisory
- Waypoint Investment Partners
- Wellington-Altus Private Wealth
- Westcourt Capital Corp.
- Wilshire
- Winton Capital
- XXIII Capital Inc.
- Yardi
- YTM Capital Asset Management

# WEALTH MANAGERS FORUM 2024

## DELEGATE LIST (1/2)

85 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 39% INVESTORS, 54% MANAGERS, 7% SERVICE PROVIDERS

- Albourne Partners
- Algonquin Capital
- Aligned Capital Partners Inc.
- Altrust Investment Solutions Inc.
- Amundi Asset Management
- Amur Financial Group
- AP Capital
- Asset Management One USA
- Bank of Montreal
- BDO Family Office
- Bell Kearns & Associates Ltd.
- BGY, Services financiers intégrés
- BMO Global Asset Management
- Bridgeport Asset Management
- Cameron Stephens Mortgage Capital Ltd
- Canadian Mortgages Inc.
- CanFirst Capital Management
- Capital Direct Management Ltd.
- CIBC
- CIBC Wood Gundy
- Citi Private Bank
- Clifton Blake Asset Management
- CMI Financial Group
- Designed Securities Ltd.
- Desjardins Financial Security
- Durum Capital Inc
- Echelon Wealth Partners
- Federation of Mutual Fund Dealers
- Fiera Capital
- Financière des professionnels
- Fundata Canada
- Government of Canada
- Greybrook
- Guardian Partners Inc.
- Hedgefacts International LLP
- HGC Investment Management Inc
- iCapital Network
- IMCO
- International Financial Data Services (IFDS)
- KPMG
- Lankin Investments
- Letko, Brosseau & Associates Inc.
- LGT Capital Partners
- Mandeville Private Client Inc.
- Manulife Securities
- MGG Investment Group
- Morgan Stanley Wealth Management
- MY Capital Management Corp.
- National Bank Financial
- Next Edge Capital Corp.
- Ninepoint Partners LP
- Northland Wealth Management
- Nour Private Wealth Inc.
- Nvestiv
- Obsiido
- Octogone Advisors (Cayman) Limited
- Odium Brown
- OZ Capital
- Patrimonica Gestion d'Actifs
- Penrose Partners / 3iQ
- Pershing Square Capital Management, L.P.
- Picton Mahoney Asset Management
- PSP Investments
- Raymond James Ltd

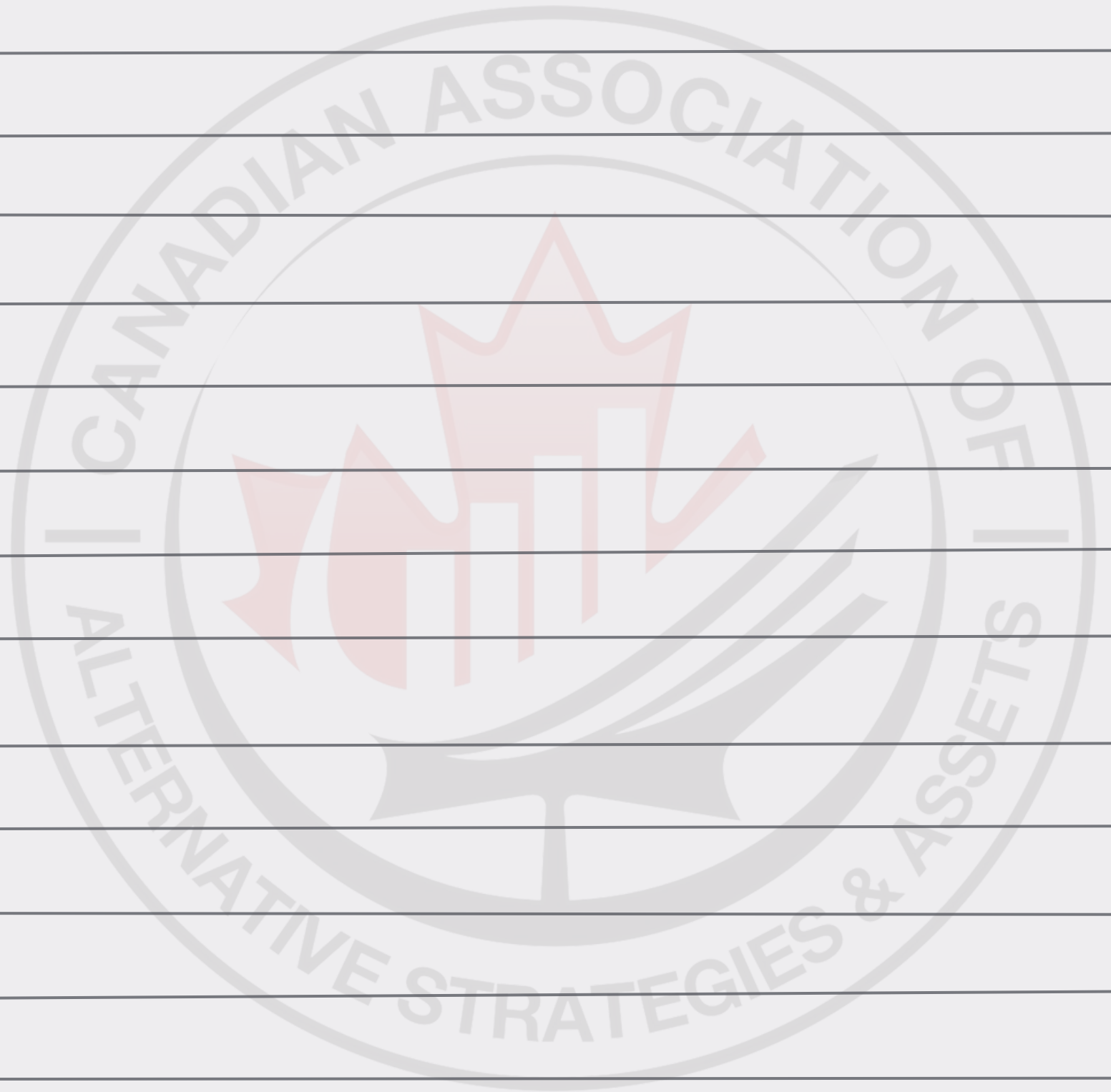
# WEALTH MANAGERS FORUM 2024

## DELEGATE LIST (2/2)

85 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 39% INVESTORS, 54% MANAGERS, 7% SERVICE PROVIDERS

- RBC Dominion Securities
- Richardson Wealth
- Rise Properties Trust
- Sagard Holdings
- Scotia Wealth Management
- Sotheby's International Realty Canada
- Steepe & Co. Ltd.
- Straight Line Capital
- Tanariva Capital, LLC
- TD Wealth
- TerraGen Technology Group Inc.
- The Rae Lipskie Partnership
- Trans-Canada Capital Inc
- TURN8 Private Wealth
- University Pension Plan Ontario
- Waypoint Investment Partners
- Wealhouse Capital Management
- Wealth Stewards Inc.
- Wellington-Altus Private Wealth
- Westcourt Capital Corp.
- Wilshire

# NOTES





# CAASA NETWORKING NIGHTS

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

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

Holiday Networking Night:  
Toronto & Montréal - Nov 26 & Dec 11 resp.

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

## Networking Nights - Registration Fees

Members of CAASA	\$30
Non-Members of CAASA	\$50

[View September Networking Night](#)  
[- Sept. 18, 2024](#)

[View Holiday Social 2024 - YYZ -](#)  
[Nov. 26, 2024](#)

[View CAASA, CAIA, EMB, and AIMA](#)  
[Holiday Social 2024 - YUL - Dec 11, 2024](#)

Thank You to our 2024 Networking Nights Venue Sponsor

C A M E R O N  
S T E P H E N S

Special Thanks to our 2024 Gold Partners





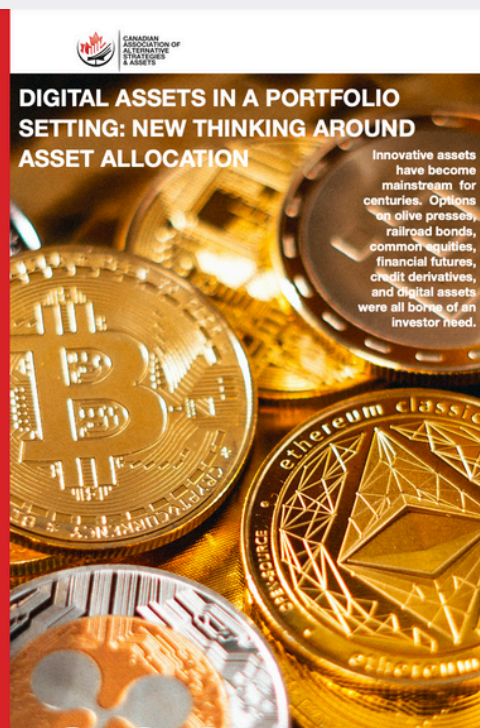
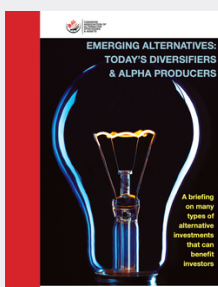
## CAASA PAPERS / PRIMERS

\$3,000



As you might recall – and possibly participated in – we have produced numerous CAASA Primers over the last 6 years. These were foundational pieces, meant to get readers up the curve in a variety of alternative areas of interest and we've had great reviews from participants and readers. Recent ones have been more thematic, which has allowed a more expansive narrative.

Distribution of soft copy on CAASA website, social media, email info packages to prospective members. Printing of 1,000 copies of to be distributed in info-packages at our 5-10 annual conferences + the 30+ that CAASA staff attend (and/or speak at) globally each year.



## CAASA MEMBER DIRECTORY



### Sponsorship Opportunities

**Full Page Advertisement**

**\$1,000**

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

**\$5,000**

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

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

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

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

# Special Thanks to our 2024 Gold Partners



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

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

Paul Koonar, CFA  
Partner  
[paul@caasa.ca](mailto:paul@caasa.ca)  
(647) 953-0737 ext. 101

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M5H 1T1