



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

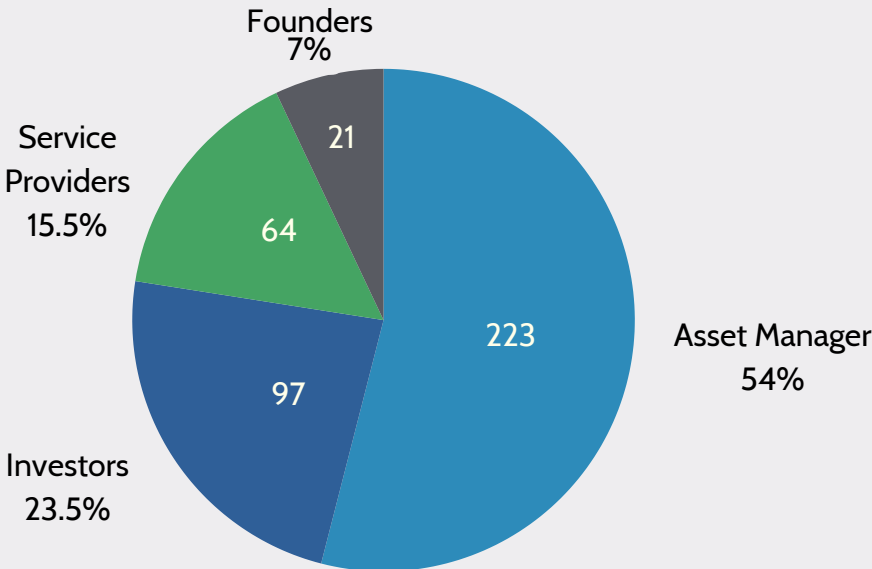
Over the last year we have exceeded our expectations for membership growth, which actually now stands at 420 members and with a fairly steady composition of ~25% investors, ~50% managers from all types of shops running many diverse alternative assets & strategies, and ~20% service providers - plus 21 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 – 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 10

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 13

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 9

WEALTH MANAGERS' FORUM

\$2,000+

TORONTO

March 27, 2025

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

PAGE 11

DIGITAL ASSETS DAY

\$2,000+

TORONTO

September 16, 2025

The conference will bring together allocators and institutional quality speakers in the digital assets space.

Thematic Conferences

PAGE 12

CAASA ALTERNATIVE PERSPECTIVES

\$2,000+

TORONTO

September 17, 2025

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

PAGE 24

FALL, SUMMER & WINTER NETWORKING NIGHTS

\$1,000+

TORONTO &

MONTREAL

Social Sponsorships

PAGE 25

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 - March 27, 2025)
 - Family Office Summit (Toronto - April 23-24, 2025) [Flagship]
 - Digital Assets Day (Toronto - September 16, 2025)
 - CAASA Alternative Perspectives: Private Market Focus (Toronto - September 17, 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 numerous Networking Nights & Holiday Socials (value of \$10,000+)
- Next call (in order of commitment date) on our additional exposure items (listed on page 14)
- Next call (in order of commitment date) on enhanced exposure items (listed on page 15) 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



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 14 & 15 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 14 & 15 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 14 & 15 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 one 45-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 14 & 15 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 one 45 minute session					
Opportunity to purchase enhanced sponsor items (page 14)					
Complimentary additional sponsor item (page 15)					
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

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	\$2,500	<p>Service Providers 7.4%</p> <p>Asset Managers 54.1%</p> <p>Investors 38.5%</p> <p>Wealth Managers 25.7%</p> <p>SFOs 4.1%</p> <p>MFOs 8.8%</p>
Silver Sponsor	\$3,500	
Title Sponsor	\$5,000 for 2025 Gold Sponsors Complimentary for 2025 Platinum Sponsor	
		click here for the delegate list

DELEGATE REGISTRATION FEES

Price increases by \$250 on March 6th, 2025 | Additional price increase of \$250 on March 20th, 2025

Investors	Complimentary
Members of CAASA Asset Manager & Service Providers	\$1,000 (\$1,250 from March 6) (\$1,500 from March 20)

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

[View 2024 Program](#)

[2025 Event Page](#)



CLIFTON BLAKE



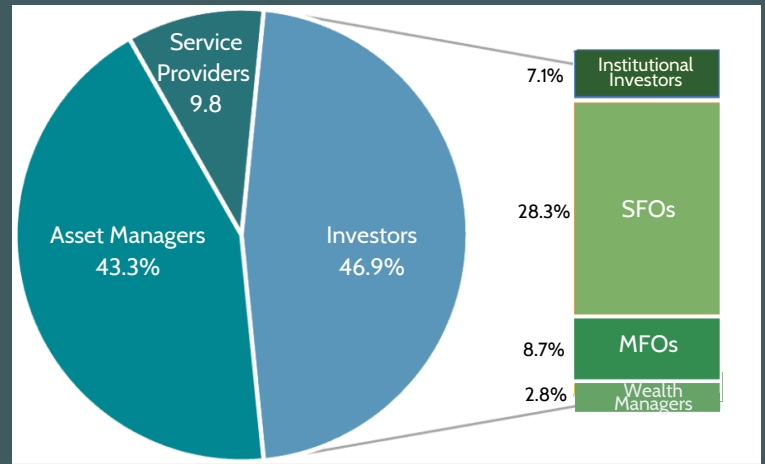
Thank you to our
past Sponsors

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

Price increases by \$250 on March 24th, 2025 | Additional price increase of \$250 on April 16th, 2025

Single Family Offices (including non-members)	Complimentary	Asset Managers: <50 Million AUM	\$1,250 (\$1,500 from March 24) (\$1,750 from April 16)
Investment Advisors	Complimentary	Asset Managers: 50 - 500 Million AUM	\$1,750 (\$2,000 from March 24) (\$2,250 from April 16)
Intermediary Investor/Consultant +1	\$160	Asset Managers: 500 - 1,000 Million AUM	\$2,250 (\$2,500 from March 24) (\$2,750 from April 16)
Ancillary Service Provider	\$1,750 (\$2,000 from March 24) (\$2,250 from April 16)	Asset Managers: >1 Billion AUM	\$2,750 (\$3,000 from March 24) (\$3,250 from April 16)
Core Service Provider	\$2,750 (\$3,000 from March 24) (\$3,250 from April 16)		

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 16, 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

Price increases by \$250 on August 19th, 2025 | Additional price increase of \$250 on September 9th, 2025

Investor

Complimentary

Members of CAASA
Asset Manager & Service Providers

\$250
(\$500 from August 19)
(\$750 from September 9)

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 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

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



DELEGATE REGISTRATION FEES

Price increases by \$250 on August 20th, 2025 | Additional price increase of \$250 on September 10th, 2025

Investor	Complimentary
Members of CAASA Asset Manager & Service Providers	\$1,000 (\$1,250 from August 20) (\$1,500 from September 10)

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.

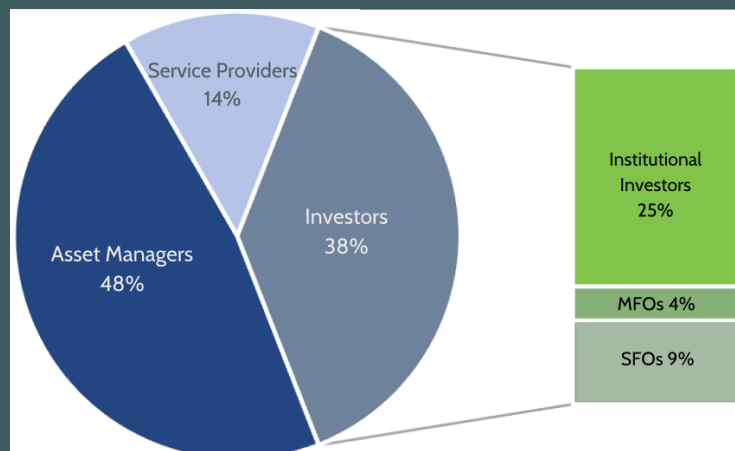
PREQIN

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 5th, 2025 | Additional price increase of \$250 on October 28th, 2025

Single Family Offices (including non-members)	Complimentary	Asset Managers: <50 Million AUM	\$1,250 (\$1,500 from October 5) (\$1,750 from October 28)
Investment Advisors	Complimentary	Asset Managers: 50 - 500 Million AUM	\$1,750 (\$2,000 from October 5) (\$2,250 from October 28)
Intermediary Investor/Consultant +1	\$160	Asset Managers: 500 - 1,000 Million AUM	\$2,250 (\$2,500 from October 5) (\$2,750 from October 28)
Ancillary Service Provider	\$1,750 (\$2,000 from October 5) (\$2,250 from October 28)	Asset Managers: >1 Billion AUM	\$2,750 (\$3,000 from October 5) (\$3,250 from October 28)
Core Service Provider	\$2,750 (\$3,000 from October 5) (\$3,250 from October 28)		

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.

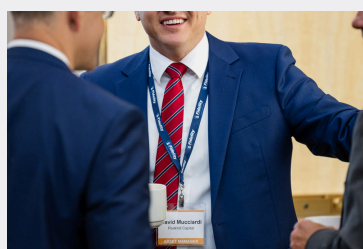
When a speaker might be keynote during a meal, sponsorship does not include any sort of speaking (intro, thanks, moderation, nor presentation) by the member. Their attachment to the timing will be mentioned and, as applicable, acknowledged visually but that is it.



- 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....

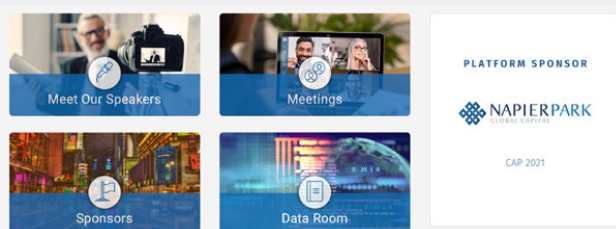
ENHANCED SPONSOR EXPOSURE ITEMS

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 2024

DELEGATE LIST (1/3)

221 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 20 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 38% INVESTORS, 48% MANAGERS, 14% SERVICE PROVIDERS

- 1642 Capital/ Blue Bridge
- AG Capital
- AIMCo - Alberta Investment Management Corp.
- Aksia LLC
- Alberta Investment Management Corporation
- Albourne Partners
- AMF - Autorité des marchés financiers
- Apex Fund Services
- Arch Re Group
- Area One Farms Ltd.
- Arjun Infrastructure Partners
- Asset Management One USA
- Avondale Private Capital
- Axonic Capital LLC
- BAC Securities
- Battea Class Action Services
- BCI
- Bimcor
- BMO Global Asset Management
- Bodhi Research Group
- Boston Partners Global Investors, Inc.
- CanFirst Capital Management
- Capital Asset Lending Inc.
- Capital Direct Management Ltd.
- Capital Fund Management (CFM)
- CDPQ - Caisse de dépôt et placement du Québec
- CF Private Equity, Inc.
- CIBC Mellon Global Securities Services Company
- Citi Private Bank
- Clifton Blake Asset Management
- Climate Finance Advisors
- CN Investment Division
- Cohen & Company Asset Management
- Collier Capital
- Concordia University
- Connor, Clark & Lunn Funds
- CPP Investments Board
- Crystalline Management Inc.
- Delbrook Capital
- Desautels Faculty of Management - McGill University
- Drakewood Capital Management Limited
- Durum Capital Inc
- DXM Capital Advisors LLC
- Episteme Capital Partners
- Equiton Inc.
- FAX Capital
- FIAM
- Fidelity Investments Canada ULC
- FondAction pour la coopération et l'emploi
- Forum Asset Management
- Franklin Templeton
- Fulcra Asset Management
- Hazelview Investments
- Healthcare of Ontario Pension Plan (HOOPP)
- Hedgefacts International LLP
- HGC Investment Management Inc
- HighVista Strategies LLC
- iCapital Network
- ICICI Bank Canada
- IMCO

CAASA ANNUAL CONFERENCE 2024

DELEGATE LIST (2/3)

221 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 20 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 38% INVESTORS, 48% MANAGERS, 14% SERVICE PROVIDERS

- Innocap Investment Management
- Intermediate Capital Group
- International Financial Data Services (IFDS)
- IronGate Capital Advisors, LLC
- J. Stern & Co., LLC
- JAM VC
- Knightsbridge Capital
- KPMG
- Kruger Pension Fund
- Leucadia Asset Management
- LionGuard Capital Management Inc.
- McGill University
- Metis Settlements Development Corporation
- Metori Capital Management
- MGG Investment Group
- Mirabaud
- MY Capital Management Corp.
- MyFO
- New North Ventures
- New York State Nurses Association Pension Plan and Benefits Fund
- Norton Rose Fulbright
- Nova Scotia Pension Services Corporation
- Nymbus Capital
- Oak House Advisers
- Omnigence Asset Management
- OPTrust
- Orchard Global Asset Management / OGAM Ltd
- P/E Investments
- PenderFund Capital Management
- Peninsula Capital Corp.
- Pension Investment Association of Canada
- Perth Advisors
- Pinnacle Investment Management
- Plaintext Capital
- PlusPlus Capital Management
- Preqin
- Prime Quadrant
- PSP Investments
- Quantica Capital AG
- RBC Investor Services
- reDeFi Capital
- ReSolve Asset Management Inc.
- Richardson Wealth
- Richter Family Office
- RSM
- Sagana
- Sage Software
- Sectoral
- SGGG Fund Services Inc.
- Société de transport de Montréal
- SS&C Technologies Inc.
- Tanariva Capital, LLC
- TD Private Investment Counsel
- Teachers' Retirement System of Texas
- Terreplein Investment Management, LLC
- TFG Asset Management
- Trans-Canada Capital Inc
- Transtrend
- Travelers Capital
- TREK Coaching Financier
- Triovest Realty Advisors
- University of Illinois Foundation
- University Pension Plan Ontario

CAASA ANNUAL CONFERENCE 2024

DELEGATE LIST (3/3)

221 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 20 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 38% INVESTORS, 48% MANAGERS, 14% SERVICE PROVIDERS

- Westbridge Capital
- Wilshire
- Winton Capital Management Ltd
- Yardi
- Yorkville Asset Management
- 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

CAASA NETWORKING NIGHTS

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

Networking Nights:
Toronto - May, July, Aug., Oct.

Holiday Networking Night:
Toronto & Montréal - TBA.

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

[May Networking Night](#)

[July Networking Night](#)

[Aug. Networking Night](#)

[Oct. Networking Night](#)

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





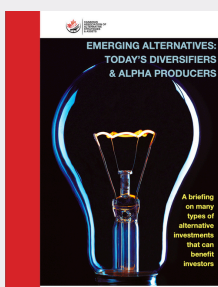
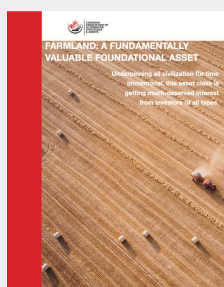
CAASA PAPERS / PRIMERS

\$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 2025 Gold Partners



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

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