



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

# FAMILY OFFICE SUMMIT 2025

## Sponsorship Guide



# 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

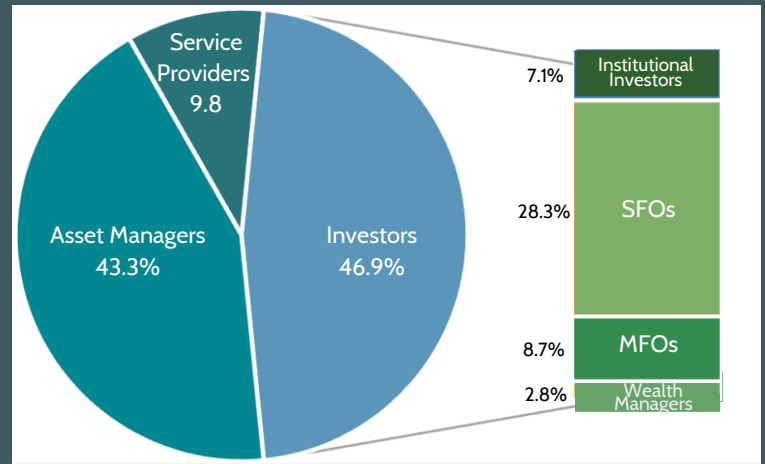


# FAMILY OFFICE SUMMIT 2025

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	\$3,500
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



# 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.

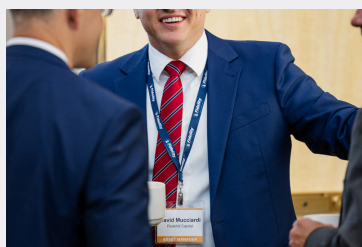
When a speaker might be keynote during a meal, sponsorship does not include any sort of speaking (intro, thanks, moderation, nor presentation) by the member. Their attachment to the timing will be mentioned and, as applicable, acknowledged visually but that is it.



- 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**



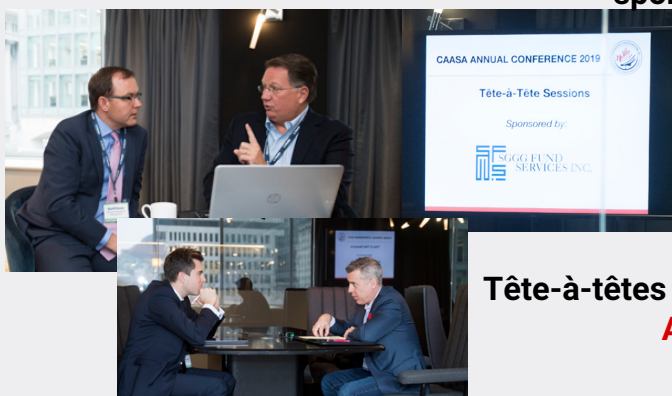
**Lanyards (provided by sponsor)**



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



**Evening Reception**



**Tête-à-têtes**  
**And More....**

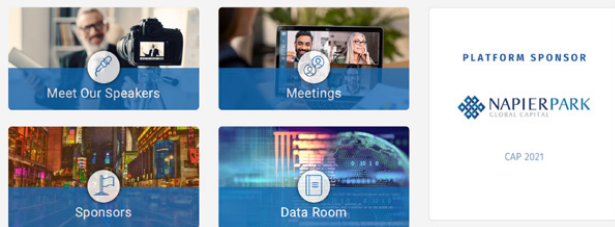
# ENHANCED SPONSOR EXPOSURE ITEMS

## 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...



**Program (\$1,500)**

**Meeting Platform (\$3,000)**



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



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

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

**And More....**

# 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

## Special Thanks to our 2025 Gold Partners



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

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