



CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

WEALTH MANAGERS FORUM 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

WEALTH MANAGERS' FORUM 2025

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	<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%
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Investors	38.5%													
Service Providers	7.4%													
Wealth Managers	25.7%													
SFOs	4.1%													
MFOs	8.8%													
Bronze Sponsor	\$2,500													
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

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

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.

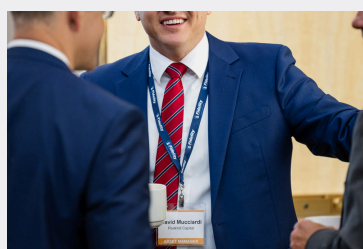
When a speaker might be keynote during a meal, sponsorship does not include any sort of speaking (intro, thanks, moderation, nor presentation) by the member. Their attachment to the timing will be mentioned and, as applicable, acknowledged visually but that is it.



- 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



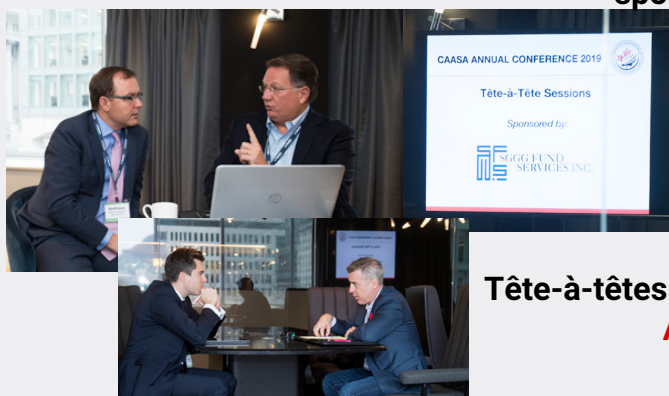
Lanyards (provided by sponsor)



Phone Chargers (stickers provided by sponsor)



Evening Reception



Tête-à-têtes
And More....

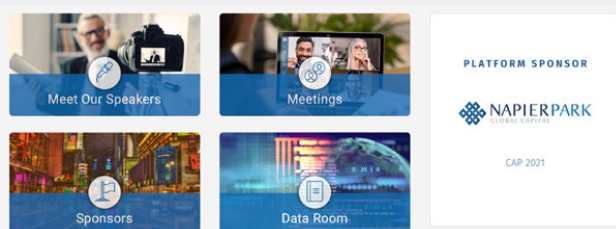
ENHANCED SPONSOR EXPOSURE ITEMS

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....

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

Special Thanks to our 2025 Gold Partners



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

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