CAASA
CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

PRESENTED BY: THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

WEALTH MANAGERS' FORUM 2025

THURSDAY, MARCH 27

Program sponsor:

Walton

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Global investment firm
with **50 years of experience**
offering innovative solutions
across traditional and
alternative asset classes
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YOUR SOURCE FOR ALL THINGS ALTERNATIVE

Welcome to our conference series focused on the requirements and preferences of retail, HNW, and UHNW Investment Advisors and allocators. We specially designed each city's program to reflect their particular preferences and have (what we believe to be) a balance of talks from seasoned Investment Advisors and asset managers. Our format reflects the high value you put on your time – we start at about lunch time and end with a reception – and appreciate your taking time to attend the session in your city. We also have small group discussions (Table Talks) where you can delve in to particular topics and query the presenters. We also have our CAASA CE Centre at your disposal which will have 70+ of our webinars and podcasts from 2021 ported over as well as a course from each of our conference sponsors, and a selection of our panels and presentations.

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iCapital. Walton® Wilshire

Thank You to Our 2025 Silver Sponsor

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CAIA ASSOCIATION®

ABOUT CAASA

INCLUSIVE, ACTIVE, AND 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: 10 conferences in 2023 consisting of 73 panels, 21 in-person events, and 16 webinars as well as publishing 4 papers and attending 29 third-party conferences throughout the year. 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 / cryptoassets, 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. CAASA is not a capital introduction platform, but we do create forums where investors and managers can meet organically or via structured meeting sessions 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.

Founders participate in our Founders' Pitch Competitions as well as other initiatives created to propel their fledgeling businesses forward.

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 large alternatives focus, 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. Talent in investment management (approximately 10% of all CFA charterholders reside in Canada) as well as newer areas such as digital assets and robo-advisory services are a differentiator. Of course, Canadian investors and managers are keen to learn of best practices in operations and portfolio management from their global peers.

WHY JOIN?

Founded in 2018, we stand at 400+ members and their motivations are plentiful and varied. Whether an investor, manager, or service provider, some seek a group of like-minded individuals in the alts space to connect with on an on-going and (semi-)structured basis; others have a more commercial interest in that they are intent upon being aware of the newest trends in the industry and (providing they have one) presenting their knowledge to an audience of peers; and others have made their mark (or are on their way to doing so) and really just want to give back to a group of people that has done a great deal for them. Whatever your motivation, if you're not in membership yet we'd love to hear from you!

MANY FORMS OF CONTENT

A PLETHORA OF WAYS TO LEARN AND INTERACT

TÊTE-À-TÊTE MEETINGS

This is your opportunity to schedule one-on-one meetings with any conference delegate. All matching is best completed by end of day on March 26th to ensure the scheduling software has time to confirm the meetings and each one is served up to you at the right time.

You can schedule as few or as many meetings as they might like. Over the years we received feedback that these are possibly the best part of our conferences as it gives folks an opportunity to connect away from the scheduled panels and meal times and really drill down into their respective interests. The software automatically suggests times that are mutually convenient for both parties.

Anyone can book a meeting with any other delegate. Please decline meetings that you might not be interested in or able to commit too - then the other party can invite another to chat. And if you are interested, you're free to connect via our messenger or email (we do not release delegate emails or other contact information, so you'll have to ask for it or send yours along to them and await a response).

All meetings will be scheduled via our conference app and web portal. Meetings are best booked by noon on Thurday, March 27th to both parties accept the meeting. Delegates are free to have ad hoc chats as well, of course, during the course of the conference at the venue.

TABLE TALKS

We do not sell paid-for speaking spots, preferring delegates to choose when they might like to hear from sponsors. Table Talks are 45-minute sessions where anywhere from 2 to 12 delegates can get a briefing on a topic and participate in an interactive discussion. As with all of our events, we refrain from pay-to-play and draw all speakers from membership and prefer audiences to opt-in to more niche discussions, as will be delivered at the Table Talks.

Attendees can choose up to two sessions out of those offered on the day of the conference. **Titles/ topics of each session will be published on our conference app and web portal, also where attendees will register for their desired sessions. This should be completed by noon on Wednesday, March 26th to ensure a table is not fully-booked, or delegates can simply sit at any of the open tables at those times.**

iCapital

The Tech Suite to Efficiently Scale your Alternative Investments Business

LEARN MORE

WEALTH MANAGERS' FORUM 2025
THURSDAY, MARCH 27TH AGENDA

9:00 AM	**Advisor registration** Please note that 9am – 10:30am is exclusive to Advisors (including Investment Advisors, MFOs, and SFOs). Asset managers and service providers are asked to register at 10:30am. None will be admitted before that time.
9:30 AM	**Manager Diligence / Scaling up Your Book/Adding Alts** **(Investment Advisors, Single Family Offices, and Multi-Family Offices Only Session)** Due to popular demand, we have organized a special advisor/allocator (IAs + select MFOs and a few SFOs) session to kick off this year's Wealth Managers' Forum. We know that IAs have numerous training programs from fund companies and their employers and this one is designed to augment that with views from th industry at large. We will cover: adding alts to your book, scaling up your book, and manager diligence as well as any topics the group would like to discuss - then we have an afternoon of even more insights! **Ted Karon**, RBC Dominion Securities, **Martin Pelletier**, Wellington-Altus Private Counsel, **Theresa Shutt**, Harbourfront Wealth Management
10:30 AM	**General Registration & Coffee** Asset managers and service providers are welcome to register at this time.
10:45 AM	**Update on Liquid Alts (6 years)** We love to gather stats on the industry and had done so for years once the Liquid Alts legislation (81-102) was promulgated in 2019 – thankfully Second engine has a dedicated team that amasses the AUM and performance statistics of the Canadian liquid alts industry and produces much better reports than we ever did. This session will highlight the growth of these ‘hedge strategies in a mutual fund wrapper’ funds and their efficacy in investor portfolios over the last 6 years. You won’t want to miss this! **Robert Wilson**, Picton Mahoney Asset Management, **Colleen Redmond**, Morgan Stanley Wealth Management Canada Inc.

WEALTH MANAGERS' FORUM 2025
THURSDAY, MARCH 27 - TABLE TALKS

iCapital
Facilitating Access to Leading Managers for Private Wealth Investors

Tom Johnston
Managing Director, Business Head for Canada

Will Blanco
Assistant Vice President, Canada Business Manager

Accessing leading alternative asset managers to incorporate into private client portfolios was previously challenging with many of these vehicles having high investment minimums and/or being offshore with manual processes and tax nuances. iCapital's solution has already launched 60 funds locally in market (structured as domestic vehicles and all on Fundserv at very compelling near institutional pricing) and opens up a broader tool kit for wealth managers to enhance diversification, increase alpha and income and downside protection in their client portfolio.

Walton Global
The evolving landscape of U.S. public homebuilders land-light strategy

Tony Deegan
Sr. Vice President of Capital Markets

How U.S. public home builders are using land light strategies and keeping non-income producing assets off their balance sheets in a rapidly growing U.S. home sector.

Wilshire
Wilshire Alternatives solutions for wealth manager: the case of the Bridgewater Partnership

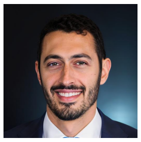
Vianney Gouny
Alternatives Client Solutions

Wassim Sakka
Head of Global Macro and Systematic hedge fund research

Join us for an insightful discussion on the Wilshire alternative investment platform, with a focus on wealth solutions and the growing democratization of alternative investments. Discover how Wilshire leverages decades of institutional expertise and deep industry relationships to provide innovative access to alternatives across public and private markets.

Return Stacked ETFs
The Return Stacking Revolution: Learn How to Unlock Institutional Alpha

Rodrigo Gordillo
President & Portfolio Manager



Richard Laterman
Head of Portfolio Solutions

Historically limited to sophisticated institutional investors, Portable Alpha is now conveniently available in pre-packaged, Return Stacked ETFs and funds. Learn how advisors can now "cheat" like institutions by layering diversifying returns on top of traditional stocks and bonds. Understand how this approach may help you outperform more consistently while also sneaking in the diversification clients need during market downturns.

Read more at caasa.ca - or contact us at +1 (647) 953-0737 or paul@caasa.ca

WEALTH MANAGERS' FORUM 2025
THURSDAY, MARCH 27TH AGENDA

11:15 AM	**Table Talks** Round table discussions hosted by our Sponsors. This session is aimed at providing all event attendees with the ability to join in genuine knowledge exchange and discussion in a small group setting. Choose from any of the topics for these 45-minute sessions
12:00 PM	**Lunch** Lunch is served prior to our Luncheon Fireside.
12:30 PM	**Lunch Keynote – 30 Years in the Business IA & Institutional** We are honored to have two big names in the Canadian wealth and alts industsry for our keynote luncheon fireside. Guy Côté is in Montréal has been an advisor for 30 years and Cameron Richards has been working in the institutional side – and now MFO – of the business for 30 years as well working in Victoria, Halifax, London (UK), and Toronto. Their perspectives on how the business of investing has evolved and where it is headed will be insightful for all in the room! **Guy Côté,** National Bank Financial, **Cameron Richards,** Guardian Partners, **James Burron,** CAASA
1:15 PM	**1:1 meetings** This is your opportunity to meet with your peers and gather important market intel from all participants. Meetings can be scheduled via our messaging and meeting app or ad hoc at this time.
2:15 PM	**Where do we stand on housing?** Aled will give an overview of the housing system across Canada as well as deliver a synopsis of the risks inherent in the system and the market. The audience will be treated to copious amounts of background information as well as the opportunity to pose their questions to him both during the session and one-on-one for the balance of the conference. Attendees can also feel free to connect with him via the meeting app for more insight and connection. **Aled ab Iorwerth**, CMHC – SCHL

A PREMIER LAND ASSET & GLOBAL REAL ESTATE COMPANY

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INVESTING ON SOLID GROUND

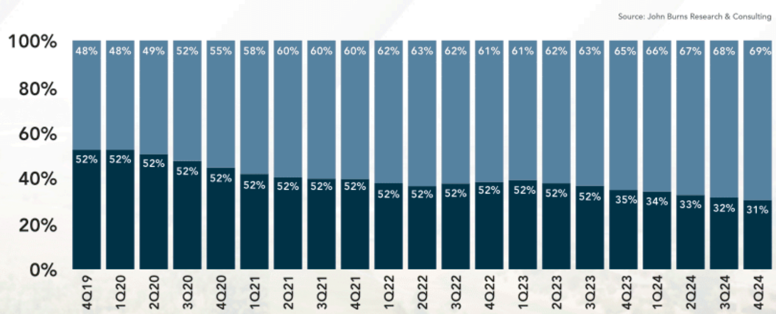
ABOUT WALTON

IN BUSINESS FOR OVER 46 YEARS, WALTON GLOBAL IS AN INTERNATIONAL REAL ESTATE INVESTMENT COMPANY FOCUSING ON THE RESEARCH, ACQUISITION, ADMINISTRATION, PLANNING AND DEVELOPMENT OF STRATEGICALLY LOCATED LAND IN MAJOR NORTH AMERICAN GROWTH CORRIDORS. WORKING CLOSELY WITH BEST-IN-CLASS REGIONAL AND NATIONAL BUILDERS, WE SPECIALIZE IN PROVIDING LAND-BASED REAL ESTATE PRODUCTS FOCUSED ON GENERATING INCOME FOR QUALIFIED INVESTORS.

SUPPORTING LEADING U.S. HOMEBUILDERS IN THEIR STRATEGIC TRANSITION TO LAND-LIGHT MODELS THROUGH BUILDER LAND FINANCING.

LOT OWNERSHIP HAS DECLINED AS HOMEBUILDERS FOCUS ON BALANCE SHEET PROTECTION. 31% IN 4Q24 VS 52% IN 4Q19.

Walton's Builder Land Financing (BLF) structure assists in developing competitive real estate offerings that are tailored to both accredited and institutional investors. This program meets the growing demand for "just-in-time" inventory models that help our top homebuilder clients in the U.S. secure the land supply necessary to build homes.



SUPPLYING LAND TO HOMEBUILDERS TO HELP MEET THE PROJECTED DEMAND FOR 18.6 MILLION NEW HOMES OVER THE NEXT DECADE.

AROUND 400,000 ACRES OF LAND ARE NEEDED TO SATISFY DEMAND:

APPROX. **1.86 M** ANNUAL NEW HOMES + APPROX. **4.64** HOMES PER ACRE + APPROX. **400 K** ACRES OF LAND

OVER **80.9K** ACRES UNDER MANAGEMENT & ADMINISTRATION

$USD **4.53** BILLION AUM & ADMINISTRATION

FOUNDED IN **1979** 46 YEARS IN BUSINESS

INVESTORS IN **92** COUNTRIES WORLDWIDE

$USD **2.67** BILLION DISTRIBUTED TO INVESTORS

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WEALTH MANAGERS' FORUM 2025
THURSDAY, MARCH 27TH AGENDA

2:45 PM	**CIO Outlook: The Future of Alternatives** This is always fun: we put together experienced pros from a variety of perspectives in alts with an experienced moderator who will guide the conversation around areas such as: what is the most exciting part of their business now; how are their respective strategy/asset specialties performing; and what are the potential hazards in their respective markets over the next 12-18 months? We will have time for audience questions and welcome all to participate. **Rafa Silveira**, LGT Capital Partners, **Paul Patterson**, Spartan Fund Management, **Ash Lawrence**, AGF Investments, **Brianne Gardner**, Raymond James Ltd
3:30 PM	**Advisors' Best Ideas for the 2020s** Ending the day with a bang – this panel brings together three IAs who have seen a plethora of market moves and a number of market sectors as they have grown, plateaued, and subsided. Let's hear from them where they see opportunities for advisors and their clients for the balance of 2025 and beyond. **Martin Pelletier**, Wellington-Altus Private Counsel, **Ida Khajadourian**, Richardson Wealth, **Theresa Shutt**, Harbourfront Wealth Management, **Josh Benchetrit**, Westcourt Capital
4:15 PM	**Reception** Opportunity to network over food and drinks!
6:00 PM	**End of Wealth Managers' Forum Toronto 2025!** See you at another conference soon! Our Family Office Summit is April 23-24.

SPEAKER BIOGRAPHIES

Thank you to our many speakers, presenters, and those who added their themes and topics, panel and non-industry speaker ideas, and other invaluable input!

KEYNOTE SPEAKER BIOGRAPHIES

Guy Côté
Senior Wealth Advisor & Portfolio Manager
Guy Côté Integrated Wealth Management – National Bank Financial

Guy Côté, CFA has 30 years of experience in finance and asset management. He holds a BAA in Finance, he is a Chartered Financial Analyst (CFA),has taken courses on derivatives (options) and financial planning offered by the investment Industry Regulatory Organization of Canada.

Guy can count on the complete range of National Bank Financial products, services and specialists as well as on his extensive network of experienced professionals, in meeting all the specific needs of his clients.

He is a director of the Lise Watier Foundation and La Pietà musical ensemble. He is also actively involved with other foundations.

Cam Richards
Chief Investment Officer
Guardian Partners

As Chief Investment Officer at Guardian Partners, Cameron's mission is to combine the investment strategies and disciplined portfolio construction and risk management utilized by pension funds and endowments, with the customization and client responsiveness required by private clients, to increase the robustness of investment solutions and to enhance the experience of Guardian Partners' clients. Previously, he served as CIO of the Nova Scotia Health Employees' Pension Plan, and was the Head of Real Assets at Albourne Partners in London, England. He also served as the Co-Chief Investment Officer of University of Toronto Asset Management (UTAM), and Chair of the Investment Committee for the entirety of the university's investment assets. Before joining Guardian Partners, he founded Isengard Capital Management, which provided capital markets research to Albourne Partners and also designed a research platform which applied global macro, stock selection and quantitative strategies to generate long and short exposures in stocks.

Cameron is a graduate of Osgoode Hall Law School in Toronto, holds a Bachelor's Degree in Mathematics from Queen's University, earned an MBA from the Schulich School of Business and is a CFA® Charterholder. He has been called to the Bar in Ontario.

SPEAKER BIOGRAPHIES

Josh Benchetrit
Principal and Portfolio Manager
Westcourt Capital

As Principal, Asset Management & Client Services, Josh's responsibilities include the construction and management of diversified investment portfolios and reviewing investment products for Westcourt's clients. Josh is registered as a Portfolio Manager (Advising Representative) and a Dealing Representative.

Prior to joining Westcourt, Josh was an executive at two of the country's largest single-family offices, and a member of the Investment Committee. In this role, he was responsible for building the investment framework covering all major asset classes and geographies.

James Burron
Founding Partner
CAASA

James co-founded CAASA in response to industry support for a Canadian alternatives association to serve all aspects including: hedge / alternative strategies; liquid alternatives; private lending; private real estate; private equity; plus emerging areas where Canada is a leader such as digital assets / blockchain and robo-advisors.

Prior to CAASA, James was the Chief Operating Officer of AIMA Canada where his team of three worked with 12 committees to produce 50-60 events per annum across Canada, organized 100+ committee meetings, and increase member numbers over his 7-year tenue from 66 to 164 corporate entities.

James currently sits on the Canadian Investment Funds Standards Committee (CIFSC), which categorizes mutual funds and alternative mutual funds (aka liquid alternatives) for the retail space in Canada. He is also called upon by membership and industry groups to speak to risk ratings and portfolio placement of all types of alternative investments.

James also has experience in research and writing for the CAIA Association (holding the designation since 2006) as well as serving on CAIA's exam council and as a well as other duties. He had roles in institutional sales and FoHF structuring in Seoul, South Korea, as a Product Manager at ICICI Wealth Management, and as an Investment Advisor at RBC Dominion Securities. James graduated from Simon Fraser University with a BBA (Finance).

SPEAKER BIOGRAPHIES

Brianne Gardner
Senior Wealth Manager
Velocity Investment Partners – Raymond James

As an Investment Advisor and co-founder of Velocity Investment Partners, Brianne uses her expertise to provide solutions to high-net-worth families who have complex financial needs, and deliver first-class service to clients who expect the best. Her dedication to understanding and managing the unique financial challenges many families face gives our clients the peace of mind they need.

With the tools provided by the leading independent firm in Canada, Raymond James Ltd., she is continually raising the bar for customized and strategic investment solutions with a focus on risk management. Brianne works closely with successful individuals, medical professionals, corporate executives, business owners and wealthy families across Canada, who have built significant wealth through years of hard work. She takes pride in the opportunity to help them grow, protect, and diversify their wealth, and when the time comes, transfer it to future generations in the most efficient manner.

Brianne and her partner John manage money for families, developing customized wealth management plans and solutions to meet their personal circumstances and goals. Brianne oversees a highly qualified team who help ensure all the clients receive ‘Amazon-like’ efficiency and ‘Four Seasons-like’ service. A disciplined and active risk management strategy allows clients to sleep soundly knowing their money is under prudent stewardship.

Her unwavering passion for being a trusted financial partner and family advisor providing valuable guidance in overseeing their financial affairs is why she has built strong, long-term relationships. Brianne has authored many industry articles over the years and is an expert contributor for Neighbours of Edgemont magazine where she educates clients and investors on financial planning and investments to help them make informed decisions and understand how their money is working for them.

Brianne acts as a mentor to young women in business and has always been an active member of her community. She is a philanthropist through her membership in professional associations and charitable organizations such as Women in Capital Markets, Young Women in Business, SFU Beedie School of Business Mentorship program and ReThink Breast Cancer.

In her free time, Brianne leads an active lifestyle, and you’ll often find her playing golf, tennis, volleyball, skiing or hiking. She and her husband enjoy travelling and they love to spend time with family.

SPEAKER BIOGRAPHIES

Aled ab Iorwerth
Deputy Chief Economist
CMHC – SCHL

Groundbreaking research by CMHC has revealed that inadequate supply is a key driver behind escalating house prices in cities like Vancouver and Toronto. The lead researcher for that project – Deputy Chief Economist Aled ab Iorwerth – now coordinates a diverse national team of researchers and analysts who are investigating impediments to housing supply and potential solutions.

“Housing markets are local. Broader challenges such as supply are often common, but the drivers and magnitude of these challenges may differ significantly across the country. My goal is to help understand and inform on market dynamics, how they support or hinder housing affordability goals and to provide thought leadership on housing economics across housing industry participants.”

Aled joined CMHC in 2016, bringing his strong analytical and research capabilities to bear on complex housing issues. He previously had a 15-year career at Finance Canada, in various research and analysis roles that included secondments to Environment Canada and the Council of Canadian Academies.

Aled holds a PhD in Economics from Western University and master’s degrees in European and International Relations (University of Amsterdam) and Economics (Carleton University). He speaks three languages: English, French and Welsh.

Ted Karon
Portfolio Manager
RBC Dominion Securities

Ted draws on his expert knowledge and more than 30 years of experience in the financial services industry to provide access to a comprehensive range of services. For the past two decades, Ted has been working with high net worth individuals and families to help them meet their complex financial goals.

His depth of experience includes investment banking, commercial lending, mergers and acquisitions, equity research and portfolio management. Over the years, Ted has also developed extensive expertise in the alternative investment sector. Ted brings a holistic perspective on investing to his work, ensuring sound advice, expert execution and peace of mind for clients who need solutions for broad and multi-dimensional wealth management needs.

A graduate of Queen’s University, he earned a Bachelor of Commerce degree with a major in finance. A firm believer in ongoing education, he has acquired the Chartered Financial Analyst (CFA) designation, and licenses for insurance, derivatives fundamentals and options.

SPEAKER BIOGRAPHIES

Ida Khajadourian
Senior Portfolio Manager, Senior Investment Advisor
Richardson Wealth

For over 20 years, Ida has worked closely with Institutions, Family Offices, wealthy entrepreneurs, and high net worth families building trusted relationships and delivering a high level of holistic Wealth Management services.

Ida's beliefs include the importance of estate planning, tax minimization, capital preservation and evolutionary portfolio construction using alternative strategies to achieve consistent absolute returns with a risk reward-oriented approach.

Ida obtained a Bachelor of Commerce Degree from the University of Toronto with specialization in Finance and major in Economics. Ida is a multi award winning Portfolio Manager and obtained her Chartered Alternative Investment Advisor (CAIA®) designation in 2005.

Ash Lawrence
Head of AGF Capital Partners
AGF Capital Partners

Ash Lawrence is Head of AGF Capital Partners, AGF Management Limited's diversified alternatives business with extensive capabilities across both private assets and alternative strategies. Ash is also a member of AGF's Executive Management Team where he assists in the development and execution of AGF's overall business strategy providing insight and vision that promotes AGF's long-term growth.

Ash is a seasoned leader with over 20 years of experience and a wide breadth of expertise in alternative investments and portfolio management across sectors. As Head of AGF Capital Partners, Ash and his team identify tenured managers with demonstrated investment expertise in their fields, structuring partnerships to offer long-term strategic support, resources and capital to sustain and enhance the partners' growth. Ash and his team are continually looking to diversify and expand the business' capabilities and alternatives offerings to meet clients' evolving needs.

Prior to joining AGF Investments, Ash spent 16 years with Brookfield Asset Management working in real estate investments and portfolio management in North America and Brazil, ultimately leading the Canadian real estate business. Ash also has experience in financing municipal infrastructure projects and developing infrastructure and transportation solutions for private and public sector clients.

Ash earned an MBA from the Rotman School of Management and a Bachelor of Applied Science in Civil Engineering from the University of Waterloo.

Ash sits on numerous Boards and is a member of the America's Executive Committee and a Global Governing Trustee for the Urban Land Institute.

SPEAKER BIOGRAPHIES

Paul Patterson
National Sales
Spartan Fund Management

Paul has been with Spartan Fund Management since 2015. From 2008 to 2014, Paul was Vice-President, Private Investment at Integrated Asset Management ("IAM"), a $3B Toronto-based multi-strategy alternative asset manager. Prior to that, he was Associate Vice-President, Institutional and Offshore at BluMont Capital, a hedge fund and structured products firm. Before joining BluMont, Paul practiced corporate and securities law with Lang Michener (now McMillan LLP) and served as legal and policy counsel with the Toronto Stock Exchange. Paul has a B.A. from Carleton University, a J.D. from the University of Toronto and an M.B.A. from Northwestern University's J. L. Kellogg School of Management. He is also CAIA charterholder and is the former Deputy Chair of the Canadian chapter of the Alternative Investment Management Association.

Martin Pelletier
Senior Portfolio Manager
Wellington-Altus Private Counsel

Martin has over 20 years of investment industry experience including senior-level positions in both institutional equity research and portfolio management.

Martin is currently a senior portfolio manager at Wellington-Altus Private Counsel (previously TriVest Wealth), an award-winning portfolio management firm (Wealth Professional 5-Star Asset Manager 2022), where he is the co-manager of the firm's risk-managed balanced fund and helps oversee custom built, HNW and UHNW private client portfolios.

Prior to co-founding TriVest and its sale to Wellington-Altus in early 2020, Martin's career was focused on institutional energy equity research and capital markets primarily at two top-ranked boutique investment banks. He provided investment recommendations on energy markets, commodities, and individual security selections to institutional fund managers located in Canada, the U.S. and Europe.

Martin is regularly featured in the media as a market strategist including his weekly column to the Financial Post's Investment Pro section for the past decade. He was won numerous awards for his passion for financial education and quality of service provided for his clients.

Martin holds a Bachelor of Commerce degree with a specialization in finance from the University of Alberta, studied international economics and finance at Örebro University in Sweden, and is a Chartered Financial Analyst (CFA) Charterholder.

Martin grew up in a small farming community in Northern Alberta and believes in the power of positive innovative change having lived in Canada's first Eco-community. He and his family is also passionate about mental-health awareness initiatives focused on youth impacted by ADHD, OCD and Autism. On weekends, his family can be found on a mountain either freestyle/big mountain skiing or downhill mountain biking.

SPEAKER BIOGRAPHIES

Colleen Redmond
Vice President, Investment Product Research
Morgan Stanley Wealth Management Canada Inc.

As part of the product team at Morgan Stanley Wealth Management Canada (MSWC), Colleen is responsible for conducting initial and ongoing due diligence on various investment products including mutual funds, ETFs, SMAs and alternatives. She works closely with internal and external partners to build out the MSWC product shelf. Prior to joining Morgan Stanley in 2022, Colleen spent over seven years at CI Global Asset Management including four years as the product manager for CI's suite of liquid alternative products. She also held roles in operations, client services and sales. Colleen holds a BBA from Wilfrid Laurier University and is a Chartered Financial Analyst. Colleen is an avid runner. In her spare time, she enjoys training for her next marathon.

Theresa Shutt
Chief Investment Officer
Harbourfront Wealth Management

In her role as Chief Investment Officer with responsibility over the Portfolio Management Department and overall investment platform, Theresa Shutt is a key member of Harbourfront's executive team, contributing to the leadership and strategic vision of the firm with a focus on increasing AUM and developing innovative investment strategies.

Theresa brings over 20 years of experience in private and public markets with demonstrated success in leading asset management teams. Prior to joining Harbourfront, Theresa was the Head of Corporate Debt for Fiera Capital, where she was responsible for the overall strategic direction of Fiera's corporate private debt strategies. In this role, she provided leadership in support of business development, investment approval, fund strategy and portfolio management. Theresa joined Fiera from Integrated Asset Management where she was Chief Investment Officer with responsibility for private market strategies.

Theresa began her career working as an economist for the Conference Board of Canada. She has held a variety of roles at large Canadian financial institutions marketing public fixed income to asset managers as well as structuring bond and equity derivative backed products for retail investors.

Theresa is a Chartered Financial Analyst charterholder and also holds a Bachelor of Arts (BA) in Economics (Honours) from the University of Alberta, a Master of Arts (MA) in Economics from McMaster University, and a Master of Business Administration (MBA) from the Rotman School of Management of the University of Toronto.

SPEAKER BIOGRAPHIES

Rafa Silveira
Portfolio Manager
LGT Capital Partners

Rafa Silveira (American/Brazilian) is a Principal at LGT Capital Partners in New York, where he serves as a portfolio manager for the LGT Multi-Alternative Fund and is a member of the U.S. leadership team. Before joining LGT in 2019, he was a portfolio manager at AQR Capital Management. He has also held roles as a solutions strategist at J.P. Morgan Asset Management and a senior quantitative analyst at Bank of America. Mr. Silveira earned a Ph.D. and M.A. in Economics from the University of Pennsylvania and a B.A. in Economics from the University of Brasília.

Robert Wilson
Senior Vice President, Head of Portfolio Construction Consultation Service
Picton Mahoney Asset Management

Robert Wilson, Senior Vice President, is the Head of Picton Mahoney's Portfolio Construction Consultation Service (PCCS). He is responsible for leading a multi-disciplinary team of experts in asset allocation, risk management, quantitative research and portfolio management. Robert and his team partner with investment advisors and institutional investors to help them construct more resilient and efficient investment portfolios. Robert is often invited to share his insights on alternative investments, asset allocation and portfolio construction with industry groups and media outlets.

Prior to joining Picton Mahoney in 2019, Robert spent 10 years working in financial services in progressively senior roles. Most recently, Robert was vice president at BlackRock Asset Management Canada Limited where he distributed iShares ETFs to Canadian investment advisors. Prior to that, Robert was an associate at PIMCO where he distributed PIMCO funds to Canadian investment advisors.

Robert holds an MBA from the Rotman School of Management at the University of Toronto. He is a CFA charterholder, and he holds the Chartered Alternative Investment Analyst designation. He is also a member of the Responsible Investment Association of Canada and holds the Responsible Investment Professional Certification designation.

NOTES

SAVE THE DATE

Flagship Conferences

FAMILY OFFICE SUMMIT | **TORONTO**
April 23-24, 2025

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

CAASA ANNUAL CONFERENCE | **MONTRÉAL**
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.

Thematic Conferences

START-UP ROUND-UP | **TORONTO**
May 12, 2025

Bringing portfolio companies/ start-ups in front of VCs, Family Offices, and other investors.

DIGITAL ASSETS DAY | **TORONTO**
September 16, 2025

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

CAASA ALTERNATIVE PERSPECTIVES: PRIVATE MARKETS FOCUS | **TORONTO**
September 17, 2025

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

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

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