PRESENTED BY: THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

DIGITAL ASSETS AND BLOCKCHAIN DAY 2025

TUESDAY, SEPTEMBER 16TH

CAASA ALTERNATIVE PERSPECTIVES 2025: PRIVATE MARKET FOCUS

WEDNESDAY, SEPTEMBER 17TH

Title Sponsor:

3iQ

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 September 15th 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.

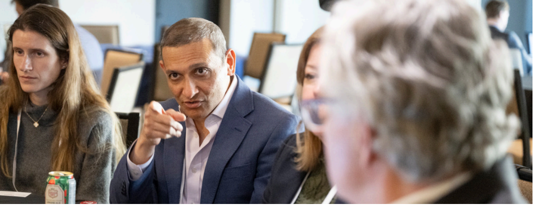
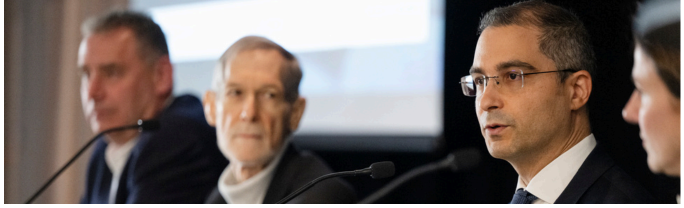
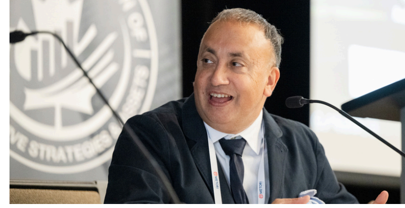
Anyone can book a meeting with any other delegate. Please decline meetings that you might not be interested in or able to commit too - then the other party can invite another to chat. And if you are interested, you’re free to connect via our messenger or email (we do not release delegate emails or other 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 Monday, September 15th 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 Monday, September 15th to ensure a table is not fully-booked, or delegates can simply sit at any of the open tables at those times.**

WELCOME TO OUR SUPER TWO-DAYS

We consistently strive to bring our audiences innovative speakers opining on topical subjects in a format that allows all to get what they want from their interactions - and our Super Two-Days is no exception. These two days can be enjoyed independently or together and guarantee insights into digital assets (Sept 16) and private markets (Sept 17) in or usual way: focusing on content and education without sponsored speaking spots and predominantly hand-picked asset owners and allocators on the panels + 1:1 meeting times and Table Talks do dig deeper if one likes. We also have a super app to connect with as we never share attendee contact info. All content is Chatham House Rule.

Thank You to Our 2025 Title Sponsor

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DIGITAL ASSETS AND BLOCKCHAIN DAY 2025
TUESDAY, SEPT 16TH AGENDA

12:00 PM	**Registration & Buffet Lunch**
12:45 PM	**Fireside: Canada's Crypto Crossroads: Regulation, Adoption & the Road Ahead** Join us for a fireside chat with Jeffery Sun, Head of Research at Alphemy Capital, previously at a Canadian Pension, and Lucas Matheson, CEO of Coinbase Canada, where we'll dive into the dynamic world of cryptocurrency in Canada. This conversation will explore the current state of crypto regulation, highlighting recent developments and the clarity needed to foster innovation. We'll discuss the evolving crypto landscape in Canada and the critical next steps for government adoption of blockchain technology to drive economic growth. The chat will also cover the shift in crypto's perception—from speculative asset to a legitimate investment class—and the rising demand for diversified crypto portfolios among Canadian investors. **Jeffery Sun,** Alphemy Capital**, Lucas Matheson,** Coinbase Canada
1:30 PM	**Watershed Moment: Cryptocurrency funds on equal footing** It seems that every asset class, including private equity, venture capital, and infrastructure – as well as alternative trading strategies such as those employed by hedge funds – is finding its way into retail portfolios. Recent legislation from the CSA (Canadian Securities Administrators – or overarching body of Canadian securities regulators) has been issued that enhances 'alternative mutual funds' (aka 'liquid alts funds') to invest in crypto assets. This allows the $60B+ in liquid alts funds to be invested in all types of equities, fixed income, derivatives and (now) crypto assets. This panel will explain the reasoning behind this watershed moment and what it means for investors. https://mcmillan.ca/insights/codifying-crypto-changes-to-national-instrument-81-102-regarding-investments-in-crypto-assets/ **Jennie Baek,** McMillan LLP, **James Emerson,** KPMG, **Ronald C. Landry,** CIBC Mellon, & **Christopher Bent,** CSA Crypto Asset Investment Fund Working Group
2:15 PM	**Coffee Break & 1:1 meetings**

DIGITAL ASSETS AND BLOCKCHAIN DAY 2025
TUESDAY, SEPT 16TH AGENDA

3:15 PM	**Beyond Bitcoin: Portfolio construction in today's world** Digital assets have progressed past just Bitcoin (there were others prior, but none achieved much traction) to include so-called altcoins – whether you define those as Ethereum and all the other coins, all coins except Ethereum, or all coins other than ETH, XRP, SOL and a few OGs. **Pascal St-Jean,** 3iQ Corp.
3:45 PM	**A Brave New World (with Brave Investors): Allocating to digital assets** Whether one is an asset-owner or an asset allocator, taking a position in a new asset class or investment idea/security can be harrowing. Failing conventionally is a career non-destruction tactic – moreso than succeeding unconventionally might be a career advancer. Thus, when a move is made it is after a great deal of thought about not only the opportunity but also the potential downside. For pensions and more public investors (such as MFOs) this can include reputation risk and at SFOs it's either one's family money or the money of one's employer – either way, a misstep might not be widely known, but it has consequences. **Saad Hassan**, Hassan Family Office, **Dean Skurka**, WonderFi, **Kevin Jiang**, Virgo Digital Asset Management Inc., **Charlie Morris**, CMCC Global
4:30 PM	**Stablecoins at a Crossroads: The Global Ripple Effects of the U.S. GENIUS Act** With the recent passage of the GENIUS Act in the United States, stablecoins are entering a new regulatory era, one that could reshape the global digital asset ecosystem. This session will unpack the implications of the Act for issuers, investors, and regulators both in the U.S. and abroad. Loiswill discuss how Canadian and global markets may adapt, whether opportunities for innovation will expand or contract, and how family offices and asset managers can position themselves in light of these changes. **Lois Tullo**, The Global Risk Institute
4:45 PM	**Reception**
6:00 PM	**End of Digital Assets & Blockchain Day**

CAASA ALTERNATIVE PERSPECTIVES 2025
WEDNESDAY, SEPT 17TH AGENDA

8:00 AM	**Registration & Breakfast**
9:00 AM	**The New Age of Venture: Rethinking Capital, Innovation, and Access** The venture capital landscape is undergoing a profound transformation—shaped by shifting economic conditions, emerging technologies, alternative funding models, and a broader push for inclusivity and impact. This panel brings together next-generation investors, founders, and ecosystem builders to explore what the future of venture looks like. From the rise of solo capitalists and venture DAOs to a growing emphasis on sustainability, AI-driven startups, and global deal flow, we'll discuss how innovation is being financed and who gets to participate. Join us for an inside look at the evolving dynamics of venture in this new era. **Tom Gillespie,** Geodesic Capital**, Prathna Ramesh,** FutureSight Ventures**, Jeff Szeto,** Avana Capital & Alder Capital Sustainable Ventures, **Marcus Daniels**, Highline Beta
9:45 AM	**Core or Satellite? Are alts a base or an extension for your portfolio?** The ideas of 'hub & spoke' or 'core & explore' usually denotes traditional investments as a base and then alternatives as a diversifier or 'extra' allocation – but what if alts are the portfolio foundation and traditional assets (if any!) are the diversifiers. Correlations of alts to traditional option is typically low and alt strategies and assets to each other is also low – so why not use them as the 80%-90% 'core' and then diversify by adding beta via traditional assets? **Jonathan Planté**, Omnigence Asset Management, **Sudharshan Sathiyamoorthy**, Star Mountain Capital, **Greg Donovan**, Avondale Private Capital, **James Burron**, CAASA
10:30 AM	**1:1 meetings / Morning Refresher** This is everyone's opportunity to meet – either as established via our conference meeting & messaging app or ad hoc

CAASA ALTERNATIVE PERSPECTIVES 2025
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11:30 AM	**Private Investments for Everyone?** A great deal of progress has occurred in creating platforms and the regulatory infrastructure to provide private investments (hitherto accessible only by those deemed wealthy enough to take on the 'risk' attributed to these investments). As institutional investors have been seen to make great gains in private assets such as PE, private lending, and infrastructure, the idea of restricting access to all other investors (who are not in defined benefit pensions) has been derided as 'undemocratic', adding supply and demand pressures to these asset classes. This panel will explain where we are in this evolution of markets and what to expect in the next short while. **Cam Richards,** Guardian Partners, **Mark Perry,** Wilshire, **Christophe Truong,** Trans-Canada Capital, **Nimar Bangash,** Obsiido
12:15 PM	**Lunch & Keynote** <u>Keynote will begin at 12:30PM</u> In today's rapidly evolving investment landscape, both asset owners and asset managers play pivotal roles in shaping strategies that address systemic risks such as climate change and shifting regulatory frameworks while driving long-term value creation. Representing the LP perspective, Maria Clara Rendón of the University Pension Plan will be joined by Miles Bloom of Partners Group, offering the GP perspective, to explore how responsible investing can serve as a practical and powerful tool for aligning interests in the LP GP relationship. This joint keynote will highlight how constructive, ongoing engagement beyond initial due diligence can foster collaboration, improve risk management, and identify new opportunities. From incident response and transparent communication to integrating ESG considerations into core investment processes, Maria Clara and Miles will share actionable insights on how asset managers and investors can work together to create resilient, high-performing portfolios that thrive in a complex global environment. **Maria Clara Rendon,** University Pension Plan Ontario (UPP), **Miles Bloom,** Partners Group
1:15 PM	**Table Talks** Your opportunity to join a table and discuss the topic on offer, lead by one of our sponsoring CAASA members.

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PRESENTED BY: THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

CAASA ALTERNATIVE PERSPECTIVES SPONSOR TABLE TALKS

1:15 PM - 2:00 PM

1.

3iQ

Beyond Bitcoin: Active Management & Private Market Opportunities in Digital Assets

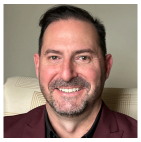
Rachel Kirkwood
Investment & Product Specialist

We look forward to exploring how digital assets are evolving beyond passive Bitcoin exposure. Join 3iQ to discuss the rise of active management, private market structures, and global institutionalization—highlighting strategies like staking, yield generation, and QMAP, our managed account platform.

2.

Capital Direct Management Ltd.

An Alternative Approach to Fixed Income



Gord Ross
Senior Vice President, Sales for Central Canada

A discussion focused around how Canadian investors can generate consistent, dependable income by including this well-diversified portfolio of Canadian residential mortgages in their investment portfolios.

3.

iCapital

Facilitating Access to Leading Managers for Private Wealth Investors

Tom Johnston
Managing Director and Canadian Market Head

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

4.

Preqin

Preqin's Insight Icebreaker

Jordan Villarreal
Vice President

Explore key trends in Canadian private capital fundraising, including a strong rebound in early 2025, trends in asset class dominance, and the growing role of private equity and venture capital.

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

5. Walton

Walton Global
How to access Portfolio Growth from the U.S. home-building deficit with a land-light strategy

Tony Deegan
Sr. Vice President of Capital Markets

Capitalize on the U.S. homebuilding deficit with a land-light strategy by leveraging partnerships and land option agreements. Minimize capital exposure while benefiting from rising demand through joint ventures, modular construction, and public-private partnerships. This approach maximizes flexibility, scalability, and returns without the risks of land ownership.

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6. NOMOS CAPITAL

Nomos Capital
Canadian Litigation Finance, Uncorrelated Alpha

Ezra Siller
Managing Director

This talk will cover the litigation finance asset class, an uncorrelated investment strategy, with a focus on the Canadian market

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7. OMNIGENCE ASSET MANAGEMENT

Omnigence Asset Management
Farmland: The Unseen Alpha in Today's Economy

Jonathan Planté
Director, Capital Markets

Growth is slowing. Inflation lingers. Trade frictions rise. Yet farmland thrives, powered by real demand and scarce supply. Omnigence invests where fundamentals, not market cycles, drive performance - making it a timely discussion for investors rethinking portfolio resilience.

CAASA ALTERNATIVE PERSPECTIVES 2025
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2:00 PM	**No Longer Plain Vanilla PE: Sponsored debt, co-investments, and NAV financing** Textbook private equity transactions by a GP are simply equity tranches or deals taken down by one sponsor or fund and then sold later for (one hopes) a profit. However, given the size of transactions private debt (in the case of its attachment to a PE transaction it's called sponsored debt) one needs to raise money for the debt piece. As well, either for diversification or simply because of size, investors may club deals and at the end of a fund's life NAV financing may come into play. This panel will speak to all parts of a transaction – especially from the debt side – to give everyone clarity. **Ben Keen**, BLG
2:30 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**, Canada Mortgage and Housing Corporation (CMHC)
3:00 PM	**Nap of the Earth: Getting into the nitty-gritty of today's real estate market** Real estate underpins the net worth of virtually every investor: if they are 'smaller' retail investors then one's principal residence is likely their largest asset and liability but it has the benefit of providing shelter. If mass affluent or wealthier, these assets take on a more investment-like place in one's mind and balance sheet – they need to perform to create positive wealth creation over many years. This panel will look into how specific real estate markets are positioned to provide this to investors; as well as the risks of certain markets. **Gavin Reiff**, Richter Family Office, **Tony Deegan**, Walton Global, **Allan Perez**, CanFirst Capital Management, **Mack Crawford**, Longridge Partners

CAASA ALTERNATIVE PERSPECTIVES 2025
WEDNESDAY, SEPT 17TH AGENDA

3:45 PM	**Oh the Portfolios You Will See: How Investment Advisors are creating resilient portfolios** The Investment Advisor or financial consultant/relationship manager is where the rubber meets the road – and it's their product due diligence and integrity in assessing suitability that allows appropriate client portfolios to be created. This panel will discuss each advisor's modus operandi regarding product sourcing and investigation as well as client communication during all types of market and economic situations. **David Sheng**, Aksia, **Chad Larson**, Canaccord Genuity Wealth Management, **Craig Machel**, Richardson Wealth, **Darren Coleman**, Raymond James
4:30 PM	**Reception** Time to make a few more connections and chat about the day
6:00 PM	**End of conference** See you at our next event!!

Open for Registration

Thematic Conferences

CAP YVR: DEMYSTIFYING FAMILY OFFICES 2025	VANCOUVER *October 1, 2025*
CAP YYC: BREAKFAST WITH FAMILY OFFICES 2025	CALGARY *October 2, 2025*

These regional events include a fireside and panels with influential Single Family Offices and Multi-Family Offices to show their peers and others (such as GPs and service providers) how these idiosyncratic entities operate.

Flagship Conferences

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. **This conference is 50% sold already.**

FAMILY OFFICE SUMMIT	TORONTO *April 28-29, 2026*

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

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

Miles Bloom
Investment Leader, Private Infrastructure Americas
Partners Group

Miles Bloom is part of the Private Infrastructure Americas business unit, based in Denver. He has 11 years of industry experience and is a Board Observer on Partners Group portfolio companies, EnfraGen, Milestone, Resilient, and Budderfly. He covers thematic areas in Low Carbon Fuels, Clean Power, and Transportation. Prior to joining Partners Group he worked at ExxonMobil across roles in corporate development, strategy, and engineering. He holds an MBA from Columbia Business School and B.S. in Chemical Engineering and B.A. in Economics from Johns Hopkins University.

Lucas Matheson
Chief Executive Officer
Coinbase Canada

Lucas Matheson is the CEO of Coinbase Canada, overseeing its strategic direction and growth within the Canadian market since January 2023. In this role, Lucas is dedicated to making digital assets more accessible to Canadians, and expanding our regulatory framework to help upgrade the financial system in Canada. Lucas was previously Senior Director at Shopify helping to make commerce better.

Maria Clara Rendon
Senior Director, Responsible Investing
University Pension Plan Ontario (UPP)

Maria Clara Rendon is a noted responsible investing specialist, with more than 12 years of experience in the assessment and management of environmental, social and governance (ESG) factors in a wide variety of industries. Her work focuses on the implementation of responsible investing practices by asset owners and managers in both North America and Latin America.
As Senior Director, Responsible Investing at University Pension Plan Ontario (UPP), Maria Clara supports the development and execution of UPP's Responsible Investing (RI) strategy. She works closely with internal and external partners to ensure a seamless integration of ESG factors into UPP's investment process and implementation of stewardship practices on behalf of over 37,000 UPP members.
Maria Clara holds a Bachelor of Science in Biological Engineering from the National University of Colombia and earned a Master of Science, Sustainability Management from Columbia University in New York, NY.

Jeffery Sun
Head of Research
Alphemy Capital

Jeffery Sun is Head of Research at Alphemy Capital, a Switzerland-regulated long-only digital asset fund. Previously, he managed the Technology and Innovation Portfolio at OPTrust, overseeing investments across a diverse range of strategies, including liquid technology investments and venture capital. Jeffery holds a Master of Computer Science from Georgia Tech and a Master of Mathematical Finance from the University of Toronto.

SPEAKER BIOGRAPHIES

Jennie Baek
Partner, Capital Markets & Securities
McMillan LLP

Jennie Baek practises capital markets and securities law with an emphasis on the investment funds and asset management industry, including compliance and registration matters.

Advising on a variety of corporate and securities law matters, Jennie assists clients with the formation, structuring, management, and distribution of public funds and private equity funds as well as other investment products. She also provides counsel on registration and regulatory compliance, corporate governance and reporting obligations, public and private financings, and stock exchange listings. Jennie is a member of McMillan’s Sustainability / ESG Initiative and co-leads the firm’s blockchain, cryptocurrency and digital assets group.

Jennie has significant experience in share and asset transactions, mergers and acquisitions, corporate reorganizations, and other corporate transactions.

Prior to joining McMillan, Jennie worked as in-house counsel at a leading investment fund company and practised at a Toronto law firm.

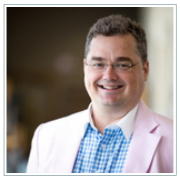
Nimar Bangash
Co-Founder & CEO
Obsiido

Mr. Bangash is the Co-Founder and CEO of Obsiido, a Toronto based technology enabled investment platform partnering with Canadian wealth managers to invest across private equity, private credit, and real assets through pooled and bespoke investment structures. Obsiido specializes in sourcing and managing evergreen, semi-liquid private market investments on behalf of its wealth manager clients. Mr. Bangash has spent 15 years in the Canadian investment management industry. Prior to founding Obsiido, he led the investment products group at a TSX listed, multi-billion dollar asset manager. He holds degrees from Queen’s University and Wilfrid Laurier University and is a CAIA Charterholder.

SPEAKER BIOGRAPHIES

Christopher Bent
Senior Legal Counsel, Investment Management Division, OSC
Co-Chair, Crypto Asset Investment Fund Working Group, CSA

Chris is a Senior Legal Counsel in the Investment Management Division of the Ontario Securities Commission where he has been involved in a variety of regulatory policy work. Chris is currently Co-Chair of the CSA Crypto Asset Investment Funds Working Group which is responsible for regulatory initiatives in the digital assets space including the Amendments to National Instrument 81-102 – Investment Funds, pertaining to funds investing in crypto assets that came into force in July 2025.



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

Darren Coleman
Senior Portfolio Manager
Raymond James

Darren Coleman started in the industry in 1992 and with Raymond James in 2012, providing comprehensive wealth services for a variety of clients. During this time, he has been managing brokerage offices, spearheading industry trends and leading his team at Portage Wealth to new territory.

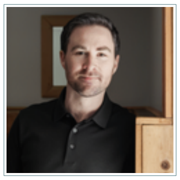
Darren's many professional accreditations include: Canadian Investment Manager, Financial Management Advisor and Fellow of the Canadian Securities Institute, with a Level II Life Insurance License and an Honours B.Comm from Ryerson University. He was one of the first Canadian professionals to attain the Professional Financial Planner, Certified Financial Planner and Certified Hedge Fund Specialist designations. Due to his success as an advisor in alternative investments, he was the first advisor to sit on committees for the Alternative Investment Management Association (AIMA), and on the Board for the Hedge Fund Association, as a member and an instructor.

An industry veteran before coming to Raymond James, Darren held management and advisor positions at major bank-owned brokerage and financial services firms. Through this experience, together with his involvement with industry boards, he has built a network of professional relationships with the industry's top managers, firms and executives, through which he is able to offer his clients superior due diligence, access and insight.

Darren is considered a champion of Raymond James' cross-border service offering and is among the Global Top 50 group of advisors within the firm across North America and the U.K.

He frequently speaks at conferences and educational events and currently sits on the Editorial Board for Advisor's Edge Report for Canadian investment professionals, and is frequently interviewed for the Globe and Mail.

SPEAKER BIOGRAPHIES



Mack Crawford
Co-Founder & CEO
Longridge Partners

Mack Crawford is the Co-Founder and CEO of Longridge Partners, a Toronto-based private investment firm focused on real estate and strategic ventures. Since founding the company in 2018, he has led its growth to more than 2,000 acres under management across the GTA, emphasizing sustainable development and nature-rich spaces.

Previously, Mack held senior leadership roles in the alternative investment industry, including Managing Director at SS&C CommonWealth and Co-CEO of Caledon Trust Company. He began his career as a Corporate Real Estate Advisor at Devencore and holds a Bachelor of Commerce degree from Queen's University.

Guided by his passion for the outdoors, Mack's philosophy is to "invest in good nature." Outside of work, he enjoys travelling & spending time outdoors with his family and their dog, Carlton.

Tony Deegan
Senior Vice President, Capital Markets
Walton Global

As Senior Vice President, Capital Markets at Walton Global, Tony Deegan is responsible for sourcing new debt & equity capital for Walton and its investment vehicles, maintaining and growing client and partner relationships, and assisting in the execution of investment strategies in both Canada and throughout Latin America. Tony has held multiple executive level positions over his 24 years with Walton including COO for Walton for Southeast Asia out of Singapore in 2018 and 2019, President of Walton International Group Canada from 2015 to 2017 and positions in Business Development, Operations, Marketing, and Investor Relations.

Greg Donovan
CEO
Avondale Private Capital

Greg has 17 years of credit-focused structuring, investing, and distribution experience, including 13 years in New York, London, and Toronto with a large Canadian firm. After founding Avondale four years ago to focus on niche underserved areas of middle market private credit and energy transition finance in North America, Avondale has grown to 22 professionals in Canada, the US and UK and has closed $500mm of credit transactions over the last 18 months.

SPEAKER BIOGRAPHIES

James Emerson
Manager, Digital Asset CoE
KPMG

James is a Manager in KPMG's Digital Asset Center of Excellence based in Toronto and he has a deep understanding of blockchain networks, digital assets and risks & controls. He has been actively involved in the Digital Asset space since 2017 and bring over 8 years of audit and advisory experience focused on supporting large publicly traded crypto funds, private financial institutions and crypto-native companies.

He specializes in the financial technology industry and has led complex crypto financial statement audits for Digital Asset exchange and broker clients. He also advises clients with their Digital Asset strategy and implementations, vendor assessments, SOC reviews, identification and evaluation of controls and risks. He has also been responsible for overseeing the development of several in house crypto specific audit tools and has delivered several externally facing educational workshops on global Digital Asset regulations.

He is certified on Chainalysis Reactor and is an Elliptic Specialist Investigator and has performed on chain digital asset investigations and wallet risk rating analysis using these blockchain analytics tools for a number of audit clients and select advisory clients.

Tom Gillespie
Partner and Head of the Alliance Fund
Geodesic Capital

Tom Gillespie is a Partner and Head of the Alliance Fund at Geodesic Capital, focused on investing in early-stage Deep Tech companies in areas such as space, maritime, power and energy, and autonomous systems. Prior to joining Geodesic, he served for a number of years as a Managing Partner on In-Q-Tel's Investment Team and Investment Lead for In-Tel's Deep Tech practice, investing in commercial, venture capital-backed technologies with the potential to address challenges faced by the U.S. national security community.

He has had a particular focus on commercial space technology and has led investments in over twenty space technology ventures, including launch vehicles, remote sensing constellations, space situational awareness, in-space logistics, and satellite componentry investments. In addition to space deals, he has led investments in the areas of robotics, materials, power sources, and autonomous systems, as well as several analytics ventures.

Prior to In-Q-Tel, Tom was a strategy consultant at Booz Allen Hamilton, serving clients in the aerospace, financial services, and government (national security and defense) sectors. Earlier experience includes positions in international privatization and the United States Congress, where he focused on telecommunications, space, financial services, and foreign affairs issue areas.
Tom earned a B.A. in Economics from Stanford University, and an M.B.A. in Finance from the Wharton School of the University of Pennsylvania.

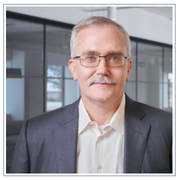
SPEAKER BIOGRAPHIES

Saad Hassan
Principal and North American Head
Hassan Family Office

Saad Hassan is Principal and North American Head of Hassan Family Office, a Abu Dhabi–based single-family office dedicated to private alternative investments. As a member of the firm's Investment Committee, he collaborates with fellow principals and family members to shape strategic asset allocations across private equity, venture capital, real estate and private credit.

In his North American role, Saad leads deal sourcing and due diligence for co-investment opportunities throughout the region, leveraging an extensive network of sovereign wealth funds, institutional allocators and top-tier general partners. He applies a data-driven investment framework combined with hands-on value-creation initiatives—focusing on operational improvement, risk management and ESG integration—to optimize long-term risk-adjusted returns.

A University of Waterloo alumnus with a Bachelor of Business Administration, Saad began his career in financial services and consulting, where he honed the analytical rigor that informs his investment philosophy today. He regularly serves as a judge at startup competitions and mentors emerging entrepreneurs on fundraising, business models and scaling high-growth ventures.



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.

SPEAKER BIOGRAPHIES

Kevin Jiang
Chief Executive Officer and Chief Investment Officer
Virgo Digital Asset Management Inc.

Kevin Jiang is the Chief Executive Officer and Chief Investment Officer of Virgo Digital Asset Management Inc., where he leads the firm's vision, investment strategy, and execution across multiple digital asset strategies. With over 14 years of experience spanning digital assets, fixed income, equities, and derivatives, Kevin brings a rare blend of traditional market discipline and cutting-edge crypto expertise. Prior to VDAM, Kevin served as Head of Trading and Portfolio Manager at 3iQ Digital Asset Management, overseeing more than $4 billion in AUM. In that role, he was instrumental in launching one of the world's first spot Bitcoin ETFs, not only in Canada but also Australia's first spot Bitcoin ETF through an ETF-of-ETF wrapper— a milestone that helped shape the global digital asset investment landscape. Kevin's institutional-grade approach to portfolio construction, risk management, and market execution has earned him a reputation for turning ideas into investable realities. He has a proven track record of developing and launching innovative, emerging investment products that anticipate market trends and meet the evolving demands of sophisticated investors.

Ben Keen
Partner
Borden Ladner Gervais LLP

Ben's practice encompasses all aspects of securities and corporate law, with a focus on public and private financings, investment fund formation and distribution, investment management, private equity and regulatory compliance.

He advises underwriters and public and private issuers, as well as investment fund managers, portfolio managers and investment dealers in connection with registration matters and the establishment, operation and administration of publicly offered and privately placed investment funds and private equity products. These include pooled funds, hedge funds, closed-end funds, mutual funds, other alternative investment vehicles and the placement of securities in Canada of foreign issuers.

He also advises Canadian and international private equity firms and private equity investors in connection with structuring, regulatory requirements and advising on the terms of offerings.

Ben also advises on domestic and cross-border M&A.

Ronald C. Landry
Vice President, Head of Segment Solutions and Canadian ETF Services
CIBC Mellon

As Vice President, Head of Segment Solutions and Canadian ETF Services at CIBC Mellon, Ron leads a team responsible for developing products and solutions that meet the sophisticated and evolving needs of CIBC Mellon's clients.

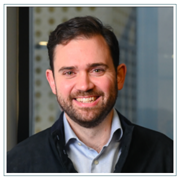
SPEAKER BIOGRAPHIES

Chad Larson
Partner and Senior Portfolio Manager
Canaccord Genuity Wealth Management

Chad Larson is a distinguished leader in Wealth Management, celebrated for his strategic vision, client-focused approach, and innovation in alternative investing. After earning a Bachelor of Arts in Economics, Chad co-founded MLD Wealth Management in 2004 and today, he manages one of the largest multi-family offices in the country, serving high-net-worth (HNW) and ultra-high-net-worth (UHNW) clients across Canada and globally. With countless accolades including being named one of the top 50 most influential individuals in the Canadian investment Industry, and most recently as Advisor of the Year – Alternative Investments by Wealth Professional, Chad's expertise and dedication has earned him the trust of Canada's most discerning investors.

Craig Machel
Portfolio Manager, Investment Advisor
Richardson Wealth

Craig empowers his clients to think differently about investing in order to ensure a positive impact in his clients' financial circumstances. He works beyond traditional portfolio management in the equity and bond markets alone to include conservative and predictable alternative assets, offering more effective diversification and a benchmark that offers protection and peace of mind regardless of market conditions. Craig is a frequent commentator on alternative asset allocations for various media outlets, and a panelist and speaker at industry events.



Charlie Morris
Co-founder and Managing Partner
CMCC Global

Charlie is the co-founder of CMCC Global. CMCC Global was founded in 2016 and is one of Asia's first venture capital companies focused solely on blockchain investments. The company now has offices in both Asia and North America and offers three different investment products: Digital Asset Fund (tokens), SyzCrest (fund of quant funds) and Titan Fund (equity VC).

Charlie was previously the CIO at a blockchain VC firm as well as a management consultant in London and software engineer in Hong Kong. He is an expert Blockchain Adviser for Chinese investment company, CLSA and was an Ethereum ICO investor in 2014. Charlie holds a PPE degree from Oxford University.

SPEAKER BIOGRAPHIES

Allan Perez
Co-Founder & Chief Executive Officer
CanFirst Capital Management

Allan Perez is a co-founder & Chief Executive Officer of CanFirst Capital Management, a private real estate equity firm. CanFirst invests on behalf of institutional and private high net worth investors and has raised in excess of $1.5 billion of equity capital since its inception. Allan's real estate career encompasses 40 years of senior executive positions with real estate organizations including The Prudential Insurance Company of America, Canderel Ltd., Dundee Realty Corporation and V&A Properties. His responsibilities included acquisition and disposition, development, marketing, leasing, e-commerce and asset management.

Allan graduated from McGill University in 1980 with a Bachelor of Commerce degree where he majored in Finance and Marketing.

Mark Perry
Managing Director
Wilshire

Mark Perry serves as Managing Director at Wilshire and oversees sourcing, due diligence, and investment monitoring for private markets sectors in the United States and Canada. As Chair of the Private Markets Manager Research and Investment Committees and portfolio manager for the Wilshire Private Assets Fund, Mr. Perry provides strategic guidance and leadership.

Before joining Wilshire in 2012, he held the position of Vice President at Centinela Capital Partners, where he gained extensive experience in investment strategies. His educational background includes a Bachelor of Science in Electrical Engineering and an MBA in Finance from the University of California, Los Angeles, as well as a Master's in Electrical Engineering from Stanford University.

Jonathan Planté
Director, Capital Markets
Omnigence Asset Management

Jonathan Planté is the Head of Capital Formation at Omnigence Asset Management. He is a seasoned alternative investment professional with 18 years of experience and a US$20Bn+ fundraising track record across all alternative asset classes, securing capital from North American and European institutional investors. His expertise spans investment structuring, market expansion, and distribution strategy optimization. Prior to joining Omnigence, he held senior positions in the asset management industry, driving significant AUM growth. Alongside his professional career, Jonathan has been teaching alternative investments at HEC Montréal for 10 years, mentoring students and young professionals entering the asset management industry.

Jonathan holds a Graduate Diploma in Finance from HEC Montréal (Canada), a Master's degree in International Business Development from ESC St-Étienne (France), and the Chartered Alternative Investment Analyst (CAIA) designation.

SPEAKER BIOGRAPHIES

Prathna Ramesh
Partner
FutureSight Ventures

Prathna is an early-stage investor and operator in B2B SaaS companies. She is currently a Partner at SF & Toronto based FutureSight, a Vertical AI/B2B Saas firm that backs repeat entrepreneurs with an all-star team and formation capital. She is the former Managing Director of Maple Leaf Angels in Toronto, one of Canada's most active angel networks, and served as GP of the MLA48 and Chief Compliance Officer. Prathna holds a Commerce degree from the Rotman School of Management, an Executive MBA from the Smith School of Business at Queens University and is an OSC licensed Exempt market professional.

Gavin Reiff
Vice-President, Real Estate Advisory
Richter Family Office

Gavin leads the Real Estate practice at Richter, managing its Real Estate Business Advisory and Investment Management services.

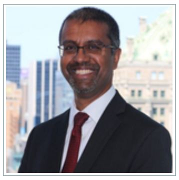
Gavin has real estate investment experience in both institutional private equity and public market environments. He has extensive investment transaction and management experience as a principal investor and a joint venture partner. Gavin is also a member of advisory boards for real estate investment funds.

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



Sudharshan Sathiyamoorthy
Senior Quantitative Specialist
Star Mountain Capital

Sudharshan Sathiyamoorthy is Senior Quantitative Specialist at Star Mountain Capital. He brings nearly two decades of experience applying quantitative analysis to investment processes and manager research across alternative investments. Previously, he led Manager Diligence and served as Chair of the Investment Committee at Richter Family Office, where he oversaw due diligence on 50+ funds spanning private credit, private equity, and secondaries, and helped institutionalize the firm's diligence framework. Earlier roles include developing and managing the external manager program at Alignvest Management Corporation and serving as an Associate Portfolio Manager at the Canada Pension Plan Investment Board, contributing to research and investments in insurance-linked securities and macro/multi-strategy managers. He began his alternatives career at DGAM (acquired by Carlyle) after roles at RBC Capital Markets. He holds a PhD in Physics from the University of Toronto and an MBA (Dean's Honor List) from Ivey Business School.

David Sheng
Managing Director – Portfolio Advisory
Aksia

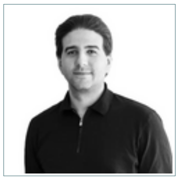
David is a Managing Director on the Portfolio Advisory team and has over 18 years of experience in alternative investments. He is responsible for alternative investment programs in the Americas, including portfolio management and construction, as well as manager evaluation. David leads alternatives coverage for Aksia's institutional Canadian clients.

Prior to joining Aksia in 2018, David was a Senior Manager Research Analyst at Man FRM focused on sourcing and evaluating alternatives strategies, as well as active portfolio management. Prior to Man FRM, David was a Vice President within the Institutional Sales and Trading business at HSBC, and before that he worked at Morgan Stanley, where he covered institutional clients across the hedge fund, asset management, and sovereign wealth fund universe, with a focus on fixed income and foreign exchange.

David graduated from Princeton University with a BA in Economics and holds an MBA from Columbia University. David was recognized as a 2023 Knowledge Broker by Chief Investment Officer and Institutional Investor's 2024 Consultant of the Year.

SPEAKER BIOGRAPHIES

Dean Skurka
President and CEO
WonderFi



Dean Skurka is the President and Chief Executive Officer of WonderFi and oversees the execution of WonderFi's strategy including product development, and growth initiatives for the Company. During his tenure, the Company has completed several acquisitions, expanded internationally, launched WonderFi Labs, and experienced significant increases in user activity, revenues, and profitability. Most notably, in 2023, Mr. Skurka led WonderFi through the transformational acquisitions of Coinsquare and Coinsmart, establishing Canada's leading crypto-trading-platform that now has over 1.7 million retail and institutional client accounts, with over $2 billion of assets under custody.

Pascal St-Jean
President & CEO
3iQ Corp.

Throughout his career, Pascal has focused on the transformation and disruption of industries via rapid scaling of businesses under his leadership. Having successfully created and grown multiple business ventures, Pascal was recognized as one of the youngest recipients of the Forty Under 40 award.
Before joining 3iQ, Pascal was an active angel investor and served as Strategic Advisor and Fractional Executive to over 5% of the Globe and Mail's 500 fastest growing companies in Canada.
Pascal's experience in open-source technologies and distributed systems led him to invest in cryptocurrency in 2016, and act as an educational resource on digital asset investments to several organizations. As President & CEO of 3iQ, Pascal is focused on overseeing the growth and global expansion of the company as it continued to pave the way as a global leader in Digital Asset Management.

Jeff Szeto
CFO & Lead Investor
Avana Capital (Single Family Office)
Alder Capital Sustainable Ventures (VC and PE firm)

Jeff is the CFO of Avana Capital, a family office, and leads VC and PE investments for Alder Sustainable Ventures, its private capital arm. He also provides CFO support to many portfolio companies, playing a key role in top grading, scaling, and growing these businesses by leveraging his 15 years of experience in leading finance functions for high-growth entrepreneurial companies. His career spans roles in M&A and corporate finance at top-tier institutions and as CFO for fast-growing private companies, guiding several from scale-up to exit.

SPEAKER BIOGRAPHIES

Christophe Truong
Senior Director, Co-Investments
Trans-Canada Capital

Christophe is responsible for private market co-investments at TCC, investing in global private opportunities across private equity, private debt, real estate and infrastructure. Christophe joined TCC in 2009 to help with the build-out and management of the private equity and co-investment programs. His past experience includes positions at leading Canadian public and corporate pension plans plans as well as global consulting, banks, asset and wealth management firms in Montreal, Toronto and Paris. Christophe holds a Master of Business Administration from McGill University and a Bachelor of Commerce from Concordia University. He is also a CFA charterholder.

Lois Tullo
Executive in Residence
The Global Risk Institute

Lois Tullo is an expert in the area of risk, technology, finance, compliance and corporate governance. She has over 30 years of business experience spanning financial services, technology, cryptocurrency, telecommunications, strategy consulting, raising venture capital, M&A, and natural resources. In 2024 she was awarded Top 10 Women CFOs in Canada. She is a UN CEFACT Expert, Digital Euro Association Expert and Global Blockchain Business Council Ambassador. She is currently completing her Doctorate in Emerging Technology with a specialization in AI at Golden Gate University in San Francisco.

As CFRO/CCO she is responsible for financial oversight for KuberMIC a Mortgage Investment Corporation and Advisor for YAMS LLP a Crypto system company. She has over 20 years of Board experience as Chair, Treasurer, and Risk and HR Committee Chair, for a tier 1 bank, private sector and not-for-profit organizations. As an Executive-in-Residence for the Global Risk Institute she spoken on and published the Global Risks and Trends Framework (GRAFT), the linkage of risk management and business strategy, Polycrisis, and the Future of Digital Assets. She has publications for the Banking, Government, and Pension/Asset Management sectors. She is an conference speaker at the United Nations, IACPM, Risk.net, etc, author, and faculty of risk mgt; cyber security, data and IT risk; and financial services at the Schulich School of Business, York University. She teaches in the Master of Risk Management Certificate program, executive programs, MBA, and undergraduate program. She is the author of the whitepaper Enterprise Risk Management – Canadian Best Practices, and Nonfinancial Risk Best Practices in Canada. She was previously CFO for CIBC Finance Inc. where she was responsible for a $6 Billion credit portfolio, Human Resources, and $1.5 securitization. She held senior positions with a large telecommunication company in the area of Finance, HR, and Business Process Redesign. She provided strategy and technology advice for a Boston consulting firm in the financial, oil and gas, mining, and government sectors. She has done international relief and development work in Ethiopia. She was in data management for a gas transmission company. Previously she was a C.P.A./C.A. with Clarkson Gordon/E&Y, and PWC.

Ms. Tullo is a CPA, CA, ICD.D, CCO. She has a Bachelor of Commerce from the University of Saskatchewan, and an EMBA from the Ivy School of Business, University of Western.

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