



CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

CAASA'S 2026 PLANNING DOCUMENT

Your member guide to value-added options for the coming year

ABOUT CAASA



INCLUSIVE, ACTIVE, & PAN-ALTERNATIVE

The Canadian Association of Alternative Strategies & Assets (CAASA) was created in response to industry requests for a national group to represent the Canadian alternative investment participants, including investors, asset managers, and service providers. CAASA is inclusive in that it welcomes participation from all companies active in the space as well as select individuals (those with investors) who might want to participate in committees and working groups – or simply attend member events – without their employer being a member of the association. CAASA is very active in both committees & groups and events: at least five conferences are planned in 2025. Pan-alternative, for CAASA, encompasses all alternative strategies and assets including: hedge funds / alternative trading strategies, private and public real estate (funds and direct), private lending, private equity, development & project finance, digital assets / crypto-assets, weather derivatives & cat bonds, and all aspects of diligence, trading, structuring, dealing, and monitoring alternatives in a stand-alone portfolio and as part of a larger investment strategy.

MEMBER BENEFITS

Investors join CAASA to be a part of a formal network of pension plans, foundations, endowments, sovereign wealth funds, and family offices to discuss ideas, strategies, and operational issues particular to their businesses – all within a closed group where managers and service providers may or may not be included, depending on the forum.

Managers see the association as a way to connect with peers, investors, and service providers to speak to fund structuring, sales & marketing, and regulatory issues. While CAASA is not a capital introduction platform, we do create forums where investors and managers can meet organically or via structured meeting sessions, such as at this conference, where participation by the investors is strictly opt-in.

Service Providers participate in our events and working groups as well as assist in the production of thought leadership pieces which provide relevant information to both association members and the industry and investing public at large.

Start-up Founders a category opened in Summer 2020, have a growing list of services and events tailored to their path to growth, including our Start-Up Round-Up held throughout the year.

NATIONAL AND GLOBAL

CAASA believes that the Canadian alternatives industry has a great deal to offer Canadians and the global community. The Canadian Model of Pension Management is well-known for its significant allocations to alternatives, managed in-house in many cases with substantial allocations to external managers as well.

Canadian investment managers operate in a robust regulatory regime (of hedge fund managers) that is becoming the norm across the globe and a stable banking back-drop that provides solace for investors as well as opportunities for managers. Of course, Canadian investors and managers are keen to learn of best practices in operations and portfolio management from their global peers.

OUR MEMBERSHIP

WE HAVE AN ALL-YEAR MEMBERSHIP DRIVE

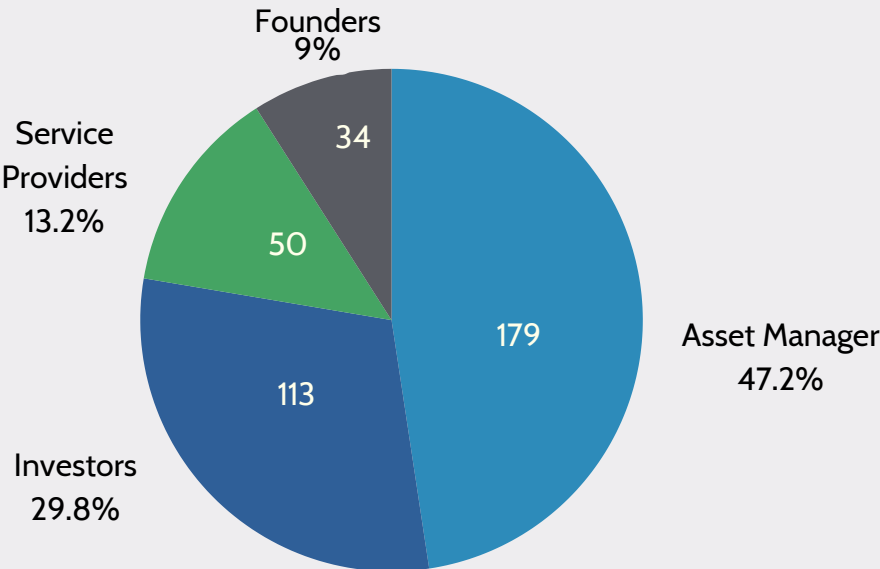
Over the last year we have exceeded our expectations for membership growth, which actually now stands at 376 members and with a fairly steady composition of ~30% investors, ~50% managers from all types of shops running many diverse alternative assets & strategies, and ~15% service providers - plus 34 start-up founders who may represent the next big companies in the world.



Our reach has increased over the last year or so as we stand at about 1 in ~4 members having no Canadian establishment (not even an employee or rep office stationed in the country) as many are seeing CAASA as their Canada play and making great use of our events and other initiatives to gain exposure to Canadian retail, HNW/family office, and/or institutional investors and/or asset managers. Of course, the prevalence of non-Canadian investors, especially family offices, pension plans, foundations & endowments, as well as sovereign wealth funds makes it more than just Canada that we are delivering to these managers

As we progress, we will be focused on Canada and our market but also live up to our motto of bringing Canada to the world and the world to Canada - and welcome more non-Canadian members of all types.

The benefit to all members is the value of this network that begets larger audiences and more diverse panels and events than any other.



SPONSORSHIP OPPORTUNITIES - 2026

PAGE 5	CAASA 2025 GOLD PARTNER \$30,000		Partnership Package Opportunities
Designed for members who wish to sponsor three of our conferences and receive prominent exposure at the conference and all in-person events (see banner to the left), first rights of benefits, and complimentary passes to in-person social events.			
PAGE 6	CAASA 2025 PLATINUM PARTNER \$50,000		
In addition to the Gold Partner benefits, our Platinum Partner will see their own independent banner at all conferences and in-person events, logo displayed on homepage of our the website, and highlighted independently on our conference event pages, discounted pricing, and much more!			
PAGE 10	FAMILY OFFICE SUMMIT \$3,500+	TORONTO April 28-29, 2026	Flagship Conferences
An alternative conference designed for Single Family Offices, Multi-Family Offices, and Retail Advisors			
PAGE 12	CAASA ANNUAL CONFERENCE \$3,500+	MONTREAL November 3-4, 2026	
This conference brings institutional investors from across the globe focusing on key issues facing investors and managers in Canada and elsewhere.			
PAGE 9	WEALTH MANAGERS' FORUM \$2,500+	TORONTO March 26, 2026	Thematic Conferences
All encompassing alternative conference designed for Retail Advisors			
PAGE 11	CAASA ALTERNATIVE PERSPECTIVES \$2,500+	TORONTO September, 2026	
This conference will bring together managers, service providers, and global allocators in the real assets and lending space.			
PAGE 15	FALL, SUMMER & WINTER NETWORKING NIGHTS \$1,000+ TORONTO		Social Sponsorships
VISIT EVENT PAGE	MAY NETWORKING NIGHT May 13, 2026	VISIT EVENT PAGE JUNE NETWORKING NIGHT June 23, 2026	
VISIT EVENT PAGE	JULY NETWORKING NIGHT July 16, 2026	VISIT EVENT PAGE SEPTEMBER NETWORKING NIGHT September 15, 2026	
PAGE 16	PAPERS / PRIMERS \$3,000+	MEMBERSHIP DIRECTORY \$1000+	Other Opportunities

CAASA 2026 GOLD PARTNER



Our 2026 Gold Partner package is designed for members who are active (or about to be!) and desire a more all-inclusive billing and offering experience. These members receive:

- Sponsorship & 3 delegate passes at any three of our conferences:
 - Wealth Managers' Forum (Toronto - March 26, 2026)
 - Family Office Summit (Toronto - April 28-29, 2026) [Flagship]
 - CAASA Alternative Perspectives: Private Market Focus (Toronto - September, 2026)
 - CAASA Annual Conference (Montréal - November 3-4, 2026) [Flagship]
- \$5,000 discount to be a conference Title Sponsor ([Page 8](#))
- Branding at all conferences via Gold Partner banner
- Complimentary sponsorship & 3 passes for our numerous Networking Nights & Holiday Socials (value of \$10,000+)
- Next call (in order of commitment date) on our additional exposure items (listed on [page 13](#))
- Next call (in order of commitment date) on enhanced exposure items (listed on [page 14](#)) for the stated additional fees
- 10% off sponsorship of our CAASA papers and primers initiated in 2026

As is our tradition, we treat all members equally for our speaking opportunities and Gold Partners are afforded the same opportunity to speak on and moderate panels and participate in podcasts.

Cost is \$30,000 (no taxes) per calendar year (no proration) in addition to annual membership dues.

Package valued at \$40,000

Gold Partners are next in line (after our Platinum Partner) for spots at all of our in-person events in 2026 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees, but can be as few as 100 attendees) and we reserve at least 40% of tickets for investors (such as pensions and single family offices) leaving, at most, 150 tickets for our manager and service provider members which number more than 300 corporate entities. Gold Partners have a guaranteed three passes per chosen conference (non-transferrable between conferences).

Special Thanks to our 2025 Gold Partners



CAASA 2026 PLATINUM PARTNER

Our 2026 Platinum Partner package is meant for those who wish to get the most exposure possible from our audience. Not only will our Platinum Partner be featured prominently at all of our conferences, but will be highlighted independently on our website, and wherever a CAASA banner is present (globally!).

Our Platinum Partner will receive everything included for our Gold Partners plus:



- Sponsorship and up to 3 passes for all CAASA Conferences
- Includes a Title Sponsor at a conference of their choosing & \$5,000 discount on any additional Title Sponsorships
- Dedicated hero banner on our website (priceless)
- Includes Sponsorship and a Foursome at CAASA Golf Day
- Individual banner with only your logo at all in-person events, both within Canada & globally
- Booth at all in-person conferences (\$14,000 value)

As is our tradition, we treat all members equally for our speaking opportunities and our Platinum Partner is afforded the same opportunity to speak on and moderate panels and participate in podcasts.

Cost is \$50,000 (no taxes) per calendar year (no proration) in addition to annual membership dues.

Package valued at \$90,000



Our Platinum Partner is first in line for spots at all of our in-person events in 2026 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees, but can be as few as 100 attendees) and we reserve at least 40% of tickets for investors (such as pensions and single family offices) leaving, at most, 150 tickets for our manager and service provider members which number more than 300 corporate entities. Our Platinum Partner has a guaranteed three passes per chosen conference (non-transferrable between conferences).

SPONSORSHIP LEVELS

MEMBERS ASK - WE DELIVER

We strive to deliver the most compelling conferences & events, inspired by your feedback. Elevate your event experience, and join us in 2026 as we unveil a new range of sponsorship opportunities, tailored to meet our members' needs and provide the exposure levels they are seeking.



2026 Platinum Sponsor

Offers your company the highest level of visibility and be exclusively showcased at each CAASA event we host in 2026. In addition to all the benefits featured in the Gold Sponsor package, our Platinum Sponsor receives an exhibit booth (valued at \$2,000), has a first call on all additional and enhanced sponsor items (see page 13 & 14 respectively) at each of their chosen conferences, and has a comp opportunity to be Title Sponsor at one of our 2026 events.

Conference Title Sponsor

Each CAASA conference, summit and forum will feature a single Title Sponsor. Title Sponsors receive all the benefits from the Gold Sponsor package, plus recognition as program sponsor, having their logo showcased on the program front cover along with a full-page advertisement on the back cover. Additionally, a two-page spread inside the program, and excellent visibility to all attendees as the conference messaging & meeting app sponsor. As the app sponsor, your corporate logo will be displayed on the splash screen every time a user accesses the platform (mobile and desktop), and on each email sent to delegates via the app. Title Sponsors also receive second call on additional and enhanced sponsor items (see page 13 & 14 respectively).

2026 Gold Sponsors

2026 Gold Sponsors will be highlighted together at every conference and event, CAASA hosts in 2026. In addition to the benefits offered through a Silver Sponsorship package, members of this level will receive third call on all enhanced sponsor items (see page 13 & 14 respectively), along with a full-page advertisement in the relevant conference program. Gold Sponsors will also be provided a discounted price to be a Title Sponsor for the conference, if available.

Conference Silver Sponsor

In addition to benefits featured in the Bronze Sponsor package, Silver Sponsors will also be entitled to a Table Talk session. During CAASA conferences, summits, and forums, sponsors of this exclusive package will be provided the opportunity to host one 45-minute roundtable discussions.

Conference Bronze Sponsor

Sponsors of this package will be provide a ½-page advertisement in the printed conference program; logo placement on the event page, all marketing collaterals and at the conference venue; complimentary sponsor item and be provided the opportunity to purchase enhanced sponsor items (see page 13 & 14 respectively).

SPONSORSHIP LEVELS

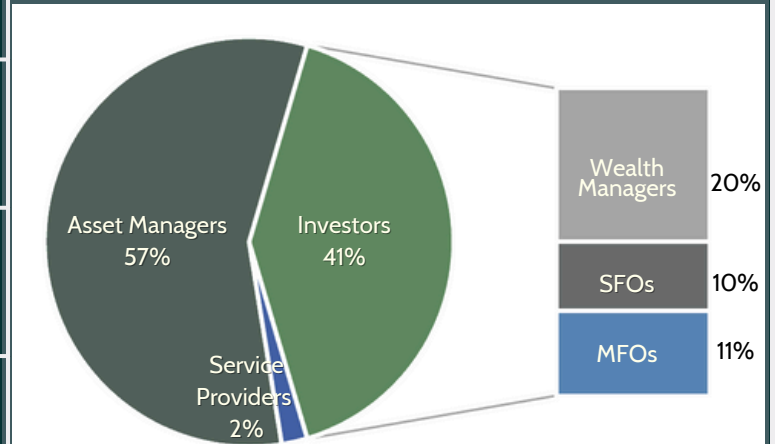
Complimentary Booth at all CAASA conferences attended					
Plantinum Sponsor banner at all 2026 CAASA events					
Gold Sponsor banner at all 2026 CAASA events					
One Complimentary Title Sponsorship					
Discounted Title Sponsorship			25 - 50% Disc		25-50% Disc
Program Sponsor with logo on front cover and full page advertisement on back cover					
Two Page Spread Advertisement					
Additional Full Page Advertisement	\$1,000	\$1,000			
Table Talk - Host one 45 minute session					
Opportunity to purchase enhanced sponsor items (page 14)					
Complimentary additional sponsor item (page 13)					
Logo placement on the event page, marketing emails, and at the conference venue					
1/2 page advertisement in the printed conference program					
	Bronze	Silver	2026 Gold	Title	2026 Platinum

WEALTH MANAGERS' FORUM 2026

MARCH 26, 2026 - TORONTO

JOIN US, DOZENS OF SPEAKERS, AND SCORES OF FELLOW IAS AND INVESTORS FOR THIS ALL-ENCOMPASSING ALTS CONFERENCE
SPECIFICALLY DESIGNED FOR RETAIL ADVISORS AND THE CLIENT BASE THEY SERVE.

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



[click here for the 2025 delegate list](#)

DELEGATE REGISTRATION FEES

Price increases by \$250 on March 6th, 2026 | Additional price increase of \$250 on March 20th, 2026

Investors

Members of CAASA
Asset Manager & Service Providers

Complimentary

\$1,000
(\$1,250 from March 6)
(\$1,500 from March 20)

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

[View 2025 Program](#)

[2026 Event Page](#)

iCapital

Walton

Wilshire



Return Stacked® ETFs

PICTON
MAHONEY
Asset Management



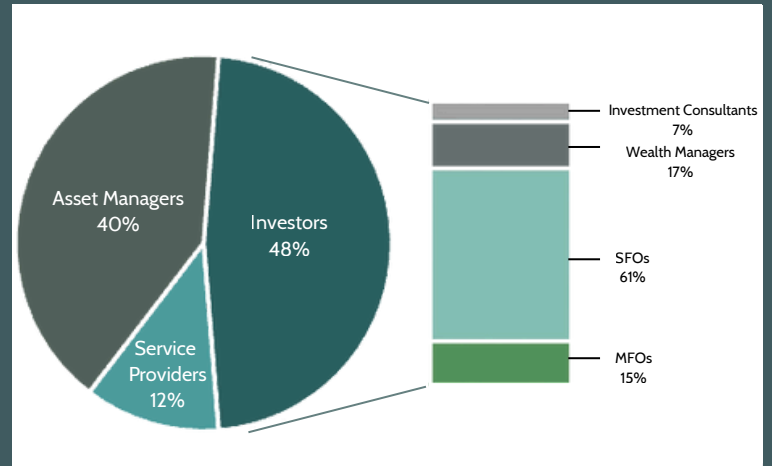
Thank you to our
past Sponsors

FAMILY OFFICE SUMMIT 2026

APRIL 28-29, 2026 - TORONTO

THE FAMILY OFFICE SUMMIT IS A CONFERENCE DESIGNED TO BRING IN SINGLE FAMILY OFFICES AND MULTI-FAMILY OFFICES, WHERE WE COVER AN ARRAY OF ALTERNATIVE STRATEGIES AND TOPICS SPECIFICALLY TAILORED FOR THE FAMILIES.

	Pricing
Bronze Sponsor	\$3,500
Silver Sponsor	\$5,000
Title Sponsor	\$20,000 \$15,000 for 2026 Gold Sponsors Complimentary for 2026 Platinum Sponsor



[click here for the 2025 delegate list](#)

DELEGATE REGISTRATION FEES

Price increases by \$250 on March 24th, 2026 | Additional price increase of \$250 on April 16th, 2026

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

Intermediary investors means Multi-family offices and investment consulting companies and +1 means the first delegate is gratis but each additional delegate attracts a small charge. Manager, investment advisor and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate category. Core service providers include prime brokers, fund administrators, accounting and legal firms.

[View 2025 Program](#)

[View 2025 Event Page](#)

[View 2026 Event Page](#)



Thank you to our
past Sponsors

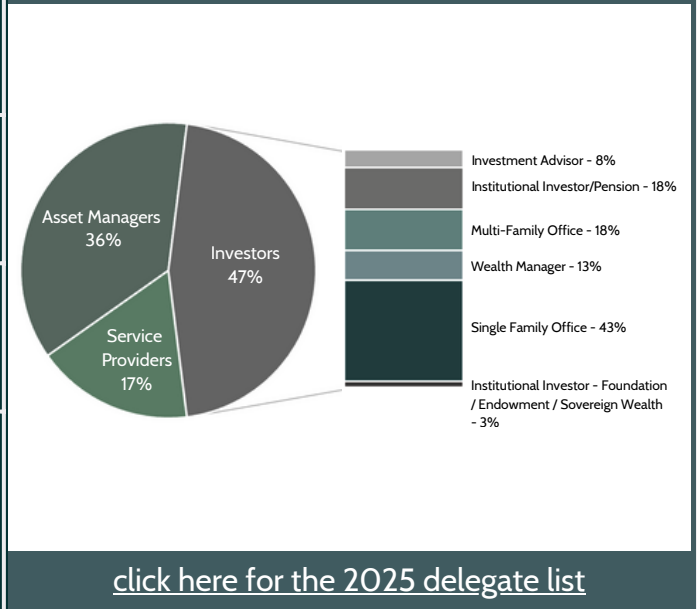


CAASA ALTERNATIVE PERSPECTIVES: PRIVATE MARKET FOCUS 2026

SEPTEMBER, 2026 - TORONTO

JOIN US, DOZENS OF SPEAKERS, INVESTORS, ASSET MANAGERS, AND SERVICE PROVIDERS ACTIVE IN THE PRIVATE MARKETS SPACE: REAL ESTATE, INFRASTRUCTURE, PRIVATE EQUITY, VENTURE CAPITAL, AND PRIVATE/ALTERNATIVE LENDING

	Pricing
Bronze Sponsor	\$2,500
Silver Sponsor	\$3,500
Title Sponsor	\$10,000 \$5,000 for 2026 Gold Sponsors Complimentary for 2026 Platinum Sponsor



DELEGATE REGISTRATION FEES

Investor	Complimentary
Members of CAASA Asset Manager & Service Providers	\$1,000

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

[View 2024 Event Page](#)

[View 2025 Event Page](#)

Special Thanks to our 2025 Event Sponsors



CapitalDirect®

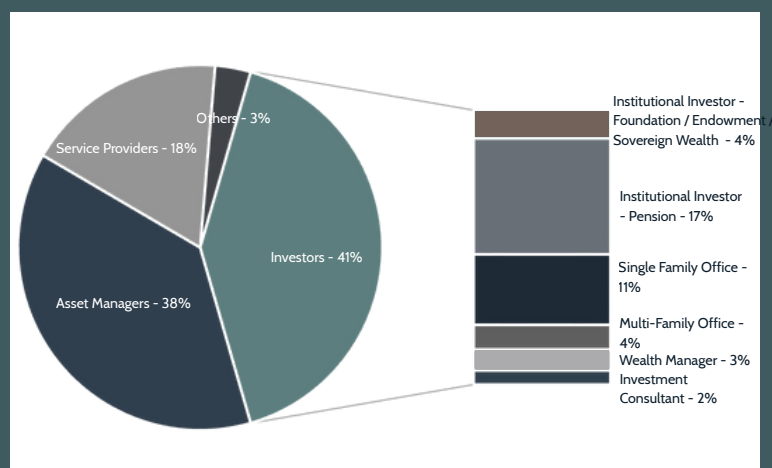


CAASA ANNUAL CONFERENCE 2026

NOVEMBER 3-4, 2026 - MONTRÉAL

OUR FLAGSHIP CONFERENCE BRINGS INSTITUTIONAL INVESTORS FROM ACROSS THE GLOBAL FOCUSING ON KEY ISSUES FACING INVESTORS AND MANAGERS IN CANADA AND ELSEWHERE INCL. STRUCTURING, LEGAL & TAX ISSUES, IT & OPERATIONAL AREAS, & INVESTMENTS

	Pricing
Bronze Sponsor	\$3,500
Silver Sponsor	\$5,000
Title Sponsor	\$20,000 \$15,000 for 2026 Gold Sponsors Complimentary for 2026 Platinum Sponsor



[click here for the 2025 delegate list](#)

DELEGATE REGISTRATION FEES

Price increases by \$250 on October 4th, 2026 | Additional price increase of \$250 on October 27th, 2026

Single Family Offices (including non-members)	Complimentary	Asset Managers: <50 Million AUM	\$1,250 (\$1,500 from October 4) (\$1,750 from October 27)
Investment Advisors	Complimentary	Asset Managers: 50 - 500 Million AUM	\$1,750 (\$2,000 from October 4) (\$2,250 from October 27)
Intermediary Investor/Consultant +1	\$160	Asset Managers: 500 - 1,000 Million AUM	\$2,250 (\$2,500 from October 4) (\$2,750 from October 27)
Ancillary Service Provider	\$1,750 (\$2,000 from October 4) (\$2,250 from October 27)	Asset Managers: >1 Billion AUM	\$2,750 (\$3,000 from October 4) (\$3,250 from October 27)
Core Service Provider	\$2,750 (\$3,000 from October 4) (\$3,250 from October 27)		

Intermediary investors means Multi-family offices and investment consulting companies and +1 means the first delegate is gratis but each additional delegate attracts a small charge. Manager, investment advisor and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate category. Core service providers include prime brokers, fund administrators, accounting and legal firms.

[View 2025 Program](#)

[View 2026 Event Page](#)

[View 2025 Event Page](#)



Thank you to our
past Sponsors



BMO Global Asset Management



sky service

COMPLIMENTARY SPONSOR EXPOSURE ITEMS

All conference sponsors are eligible to receive, without additional cost, the following exposure items at our in-person conferences (as applicable to the program and venue capacity/capabilities):

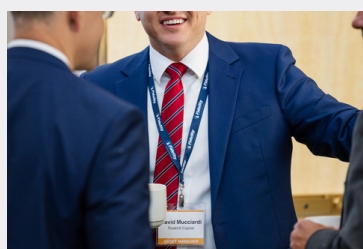
These exposure items are apportioned on a first-come basis to members as they commit to sponsoring the event. Platinum Sponsors have first call on any remaining item from when they commit to that level of sponsorship and Gold Sponsors have next call on any remaining item once Platinum Sponsors have had their turn. (Gold Sponsors will receive their option at least one month prior to the event, in any case.) Choice of exposure items then goes to other sponsors in the order in which the committed to the conference.

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

- Breakfast
- Morning Break
- Lunch
- Afternoon Break
- Evening Reception (may include wine-tasting or the like)
- Tête-à-tête meeting times (usually 1 per day)
- Lanyards (provided and delivered by the member)
- Portable phone chargers



Meals & Breaks



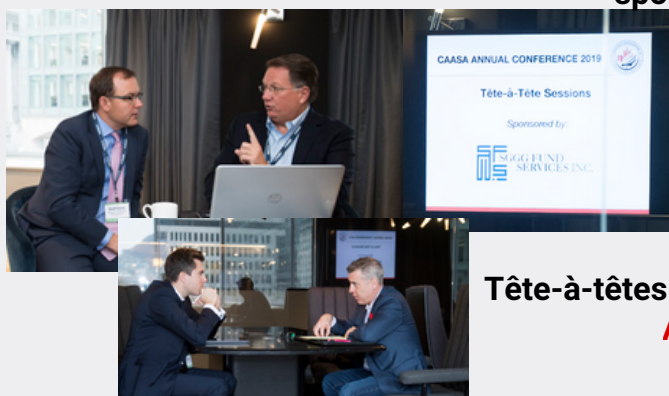
Lanyards (provided by sponsor)



Phone Chargers (stickers provided by sponsor)



Evening Reception



Tête-à-têtes

And More....

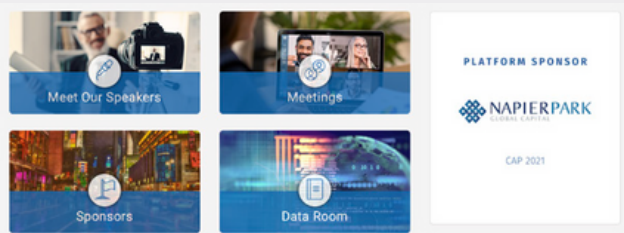
ENHANCED SPONSOR EXPOSURE ITEMS

A Plethora of Sponsorship Opportunities



These exposure items are purchased on a first-come basis to members as they commit to sponsoring the event. Platinum Sponsors have first call on any remaining item from when they commit to that level of sponsorship and Gold Sponsors have next call on any remaining item once Platinum Sponsors have had their turn. (Gold Sponsors will receive their option at least one month prior to the event, in any case.) Choice of exposure items then goes to other sponsors in the order in which they committed to the conference.

- Hotel keycards (CAASA Annual Conference): usually \$1,500 for the keycard logo placement + \$500 for keycard protective sleeve logo placement
- Program (logo on cover page): \$1,500 per conference
- Meeting platform (logo on each login page and emails): \$3,000 per conference
- Espresso coffee bar & barista (including logo placement on froth): TBD; likely \$3,000
- Others as they present themselves...



Meeting Platform (\$3,000)



Hotel key cards (\$1,500+)



Fancy Coffee (~\$3,000)

Booth (\$2,000)

And More....



CAASA NETWORKING NIGHTS

Sponsorship for Networking Nights is \$1,000 or \$5,000 for all 2026 Socials (incl. 2 Holiday Socials - Dates TBD)

Sponsorship includes 4 passes, logo placement on the event page and at the venue

Summer Networking Nights - Registration Fees

Members of CAASA	\$40
Non-Members of CAASA	\$60

May Networking Night

May 13, 2026

June Networking Night

June 23, 2026

July Networking Night

July 16, 2026

Sept. Networking Night

Sept. 15, 2026

Special Thanks to our 2025 Gold Partners





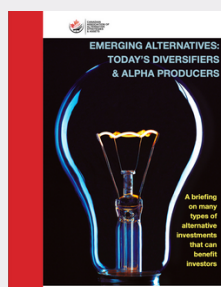
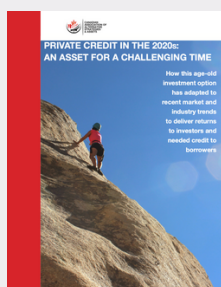
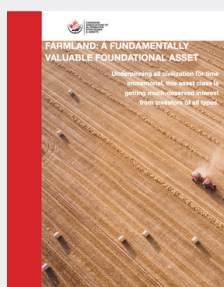
CAASA PAPERS / PRIMERS

\$3,000



As you might recall – and possibly participated in – we have produced numerous CAASA Primers over the last 6 years. These were foundational pieces, meant to get readers up the curve in a variety of alternative areas of interest and we've had great reviews from participants and readers. Recent ones have been more thematic, which has allowed a more expansive narrative.

Distribution of soft copy on CAASA website, social media, email info packages to prospective members. Printing of 1,000 copies of to be distributed in info-packages at our 5-10 annual conferences + the 30+ that CAASA staff attend (and/or speak at) globally each year.



CAASA MEMBER DIRECTORY



Sponsorship Opportunities

Full Page Advertisement

\$1,000

**Directory Sponsor
Cover Page Logo and Full
Back Cover Advertisement**

\$5,000

As you are likely aware, CAASA prints and distributes a program for each conference, complete with the agenda, speakers, sponsor advertisements and, until now, our member directory.

With our organizing two flagship conferences and seven one-day conferences each year, the membership directory is constantly changing (new members every week!), and the environmental impact of additional pages dedicated to the member directory for every conference, we decided to split the document.

Our conference programs will be supplemented by our bi-annual Member Directory: as of the end of March, before the Family Office Summit, and the end of October, before the CAASA Annual Conference.

All members will be displayed in the directory and this also brings an opportunity to those who want a larger presence and promote their offering for our members and the public with the option to have a full page advertisement or be the directory sponsor!

CAASA ANNUAL CONFERENCE 2025

DELEGATE LIST (1/2)

199 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 20 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 41% INVESTORS, 38% MANAGERS, 18% SERVICE PROVIDERS

- 3iQ Corp.
- AE Industrial Partners, LP
- AGAWA Fund Management Inc.
- AGF Capital Partners
- AIMCo
- AllMind AI
- Altervest Ltd.
- AMF - Autorité des marchés financiers
- AQR Capital Management
- Arch Capital Group
- Ardian
- Area One Farms
- Arthur J. Gallagher
- Asset Management One USA
- Axonic Capital LLC
- BAC Securities
- Bank of Canada
- BCI
- BDO
- Bimcor
- BlackRock
- BMO Global Asset Management
- Bodhi Research Group
- BroadRiver Asset Management LP
- CAIA
- CanFirst Capital Management
- Capital Direct Management Ltd.
- Capital Fund Management (CFM)
- CIBC Mellon
- Citi Private Bank
- City Flats Asset Management
- Climate Finance Advisors
- CMI Financial Group
- CN Investment Division
- Cohen & Company Asset Management
- Concordia University
- Coriel Capital Inc.
- CPP Investments
- Cross Ocean Partners
- Crystalline Management Inc.
- Delbrook Capital
- Dicello Levitt LLP
- Duke Capital Limited
- Durum Capital Inc
- Electra Capital Advisors Ltd
- Evolution Credit Partners
- Evovest inc.
- Farm Credit Capital
- Financial Recovery Technologies
- Fondaction
- Forthlane Partners
- Forum Asset management
- Future Standard
- Healthcare of Ontario Pension Plan
- HEC Montreal Pension
- Hedgefacts International LLP
- HGC Investment Management Inc
- Hydro Québec
- Hydro-Quebec
- iCapital Network
- Innocap
- International Financial Data Services (IFDS)
- Investissement Quebec
- ITE Management
- Keystone Farmland Management
- Kruger Inc Pension

CAASA ANNUAL CONFERENCE 2025

DELEGATE LIST (2/2)

199 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 20 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 41% INVESTORS, 38% MANAGERS, 18% SERVICE PROVIDERS

- Kudu Investment Management
- La Caisse
- Lawrence River Capital
- LGT Capital Partners
- Lombard Odier
- Lucie and André Chagnon Foundation
- LuminArx
- MEMCO: Multilateral Endowment Management Company
- Mercan Group
- Mirae Asset Securities (USA) Inc.
- Morgan Stanley
- Nasdaq
- New Holland Capital, LLC
- New York State Nurses Association Pension Plan and Benefits Fund
- Northside Ventures
- Norton Rose Fulbright
- Nymbus Capital
- Oak House Advisers
- Ocree Capital
- Omnigence Asset Management
- Ontario Teachers' Pension Plan
- OPTrust
- P/E Investments
- PenderFund Capital Management
- Perth Advisors LLC
- PlusPlus Capital Management
- Preqin
- Prudential Financial
- PSP Investments
- RBC Investor Services
- Richardson Wealth
- Richter Family Office
- Royal London Asset Management
- Ruffer LLP
- Sage Software
- Sectoral
- SimCorp
- Skyservice Business Aviation
- SS&C Technologies Inc.
- Star Mountain Capital
- State of Wisconsin Investment Board
- TD Asset Management
- Tetrix
- The World Bank
- Theia Partners
- Tikehau Capital Canada
- Trans-Canada Capital
- UBC Investment Management
- Ullico Canada Marketing Services, Inc.
- University of Alberta
- University of Illinois Chicago
- University Pension Plan Ontario
- Wilshire
- YTM Capital Asset Management

FAMILY OFFICE SUMMIT 2025

DELEGATE LIST (1/3)

215 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 71 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 55% INVESTORS (71 SFOS, 12 FROM MFOS), 36% MANAGERS, 12% SERVICE PROVIDERS.

- 10D
- 3iQ Corp.
- AE Industrial Partners, LP
- AGF Capital Partners
- Altervest Private Wealth
- Anacapa Advisors
- Apogem Capital
- Apollo Global Management
- Area One Farms Ltd.
- Aspect Capital
- Asset Management One USA
- August Group Capital
- Avondale Private Capital
- Axonic Capital LLC
- BAC Securities
- Bain Capital
- BDO Canada
- Beutel, Goodman & Company
- BMO Global Asset Management
- Bodhi Research Group
- BroadRiver Asset Management
- CAIA Association
- Cameron Stephens
- CanFirst Capital Management
- Canyon Partners
- Capital Direct Management Ltd.
- Capital Fund Management (CFM)
- CBRE IB
- CF Private Equity, Inc.
- CIBC Wood Gundy
- Cidel Asset Management
- Citi Private Bank
- Clear Skies Investment Management
- Climate Finance Advisors
- Coller Capital Limited
- Composer Technologies Inc.
- CrossLayer Capital
- Delbrook Capital
- Designed Securities Ltd.
- Durum Capital Inc
- Earl & Partners
- Eckler Ltd.
- FAX Capital
- FIAM
- Fidelity Canada Institutional
- FirePower Capital
- Ginsler Wealth Management Inc.
- Golden Eagle Strategies, LLC
- HalBar Partners
- Hamilton Lane
- Harbourfront Wealth Management
- Harlo Capital
- Heartwood Trust
- HedgeFacts
- HGC Investment Management Inc
- iCapital Network
- INP Capital
- Introduction Capital
- J. Stern & Co., LLC
- Jisrak
- Jolt Capital
- JP Morgan

FAMILY OFFICE SUMMIT 2025

DELEGATE LIST (2/3)

215 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 71 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 55% INVESTORS (71 SFOS, 12 FROM MFOS), 36% MANAGERS, 12% SERVICE PROVIDERS.

- Kazana Capital Corp.
- Kensington Capital Partners
- Keystone Farmland Management
- KPMG
- Leith Wheeler Investment Counsel Ltd.
- LetkoBrosseau
- LGT Capital Partners
- LION-S
- LionGuard Capital Management Inc.
- Lombard Odier
- Longridge Partners
- Managed Funds Association
- March Altus Capital Manager
- Massey Henry
- Mercer
- Merchant Opportunities Fund
- Music Royalties Inc
- Nasdaq
- Ndex Systems Inc.
- Nomos Capital
- Northwood Family Office
- Numus Financial
- Ocree Capital
- Odlum Brown
- Omnigence Asset Management
- Orchard Global
- Our Family Office
- Owemanco Mortgage Trust
- OZ Capital
- PBY Capital Ltd.
- Peninsula Capital Corp.
- Picton Mahoney Asset Management
- Pinnacle Investment Management
- PortfolioHiWay
- Preqin
- RBC Dominion Securities
- RBC Investor Services
- Richardson Wealth
- Richter Family Office Inc.
- Rubach Wealth
- Ruffer LLP
- Sagana
- Sagard Holdings
- Sagard Wealth
- Sage Software
- Sarona Asset Management
- Schwaben Capital Group Limited
- Sectoral
- Skyservice Business Aviation
- Sofistic.ai
- Steepe & Co. Ltd.
- StepStone Group
- Sterling Family Capital Advisors
- Stonehage Fleming
- StrongHold Fund
- Systemic Trust Company
- TD Asset Management
- TFG Financial
- Trans-Canada Capital Inc
- Virgo Digital Asset Management Inc.
- VRG Capital
- Walton Global
- Wealhouse Capital Management

FAMILY OFFICE SUMMIT 2025

DELEGATE LIST (3/3)

215 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 71 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 55% INVESTORS (71 SFOS, 12 FROM MFOS), 36% MANAGERS, 12% SERVICE PROVIDERS.

- Wealthsimple
- Wellington-Altus Private Wealth
- Westcourt Capital Corp.
- Wilshire
- Yardi Canada
- Yorkville Asset Management

WEALTH MANAGERS FORUM 2025

DELEGATE LIST (1/2)

90 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 41% INVESTORS, 57% MANAGERS, 2% SERVICE PROVIDERS

- National Bank Financial - Wealth Management
- Greybrook
- GB Wealth Inc.
- Ninepoint Partners LP
- Mercer
- Richardson wealth
- Westcourt Capital Corp.
- VRG Capital
- Stonehage Fleming
- Asset Management One USA
- AGF Capital Partners
- Spartan Fund Management Inc.
- Owemanco
- Omnigence Asset Management
- Wilshire
- Walton Global
- iCapital Network
- National Bank Financial
- New North Ventures
- Schwaben Capital Group Limited
- RBC Investor Services
- Designed Wealth Management
- Sofistic.Ai
- BMO Private Wealth
- BMO Nesbitt Burns
- Wellington-Altus Private Wealth
- Virgo Digital Asset Management
- Picton Mahoney Asset Management
- Equiton Inc.
- Ruffer
- Owens MacFadyen Group
- Ventum Financial
- Worldsource Financial
- CanFirst Capital Management
- Capital Direct Management Ltd.
- Sue Chambers Financial Services
- CIBC Wood Gundy
- Cameron Stephens Mortgage Capital Ltd
- Sagard Holdings
- Sarona Asset Management
- Designed Securities Ltd.
- Federation of Independent Dealers
- Morgan Stanley Wealth Canada
- FutureSight
- CI Global Asset Management
- Knightsbridge Capital
- Mackenzie Investments
- LGT Capital Partners
- AGF Investments
- Raymond James Ltd
- CMHC - SCHL
- Odium Brown
- INKAS® Group of Companies
- AppGear Capital
- Westcourt Capital
- East West Investment Management Corporation
- Franklin Templeton
- PBY Capital Ltd.
- The Farmer Group
- HGC Investment Management Inc
- Aptus Capital Startups Fund Managment.

WEALTH MANAGERS FORUM 2025

DELEGATE LIST (2/2)

85 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 39% INVESTORS, 54% MANAGERS, 7% SERVICE PROVIDERS

- Sterling Family Capital Advisors
- Peninsula Capital Corp.
- OZ Capital
- ReSolve Asset Management Inc.
- Yorkville Asset Management
- RBC Dominion Securities
- Guardian Partners Inc.
- Harbourfront Wealth Management
- Trivest Wealth
- Letko, Brosseau
- FirePower Capital
- Collier Capital Limited
- Orchard Global
- Virgo Digital Asset Management Inc.
- Czerlau Family Office
- Trans-Canada Capital Inc
- Westcourt Capital Corp
- Desjardins Financial Security
- Sanctuary
- BDO Canada

CAASA ALTERNATIVE PERSPECTIVES 2025

DELEGATE LIST

122 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 47% INVESTORS, 36% MANAGERS, 17% SERVICE PROVIDERS

- 3iQ Corp.
- AGF Investments
- Aksia LLC
- Algoz
- Alphemy Capital
- Apex Fund Services
- AppGear Capital
- Area One Farms Ltd.
- Arxnovum Capital
- Avondale Private Capital
- Axonic Capital LLC
- Biricz Taylor Investments Ltd.
- BLG LLP
- BNQ Group
- Bodhi Research Group
- BroadRiver Asset Management LP
- Canaccord Genuity
- CanFirst Capital Management
- Capital Direct Management Ltd.
- Carte Wealth Management Inc
- CF Private Equity, Inc.
- CIBC Mellon Global Securities Services
- Cidel Asset Management
- CMCC Global
- CMHC - SCHL
- Coinbase
- Designed Securities Ltd.
- FutureSight
- Greybrook
- Guardian Capital LP
- Guardian Partners Inc.
- Hassan Family Office
- Highline BETA
- iCapital Network
- In-Q-Tel
- INKAS® Group of Companies
- International Financial Data Services
- KPMG
- Longridge Partners Inc.
- McCain Foods Limited
- McMillan LLP
- Nomos Capital
- North Horizon Holdings
- OMERS
- Omnigence Asset Management
- OTPP - Ontario Teachers' Pension Plan
- OZ Capital
- Partners Group
- PortfolioHiWay
- Preqin
- Prime Quadrant
- Raymond James Ltd
- reDeFi Capital
- RedJay Asset Management Inc.
- Richardson Wealth
- Richfox Capital Investment Management
- Richter Family Office
- Semper8
- Star Mountain Capital
- Steepe & Co. Ltd.
- StepStone Group
- Stonehage Fleming
- Tetrix
- Trans-Canada Capital Inc

CAASA ALTERNATIVE PERSPECTIVES 2025

DELEGATE LIST

104 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 38% INVESTORS, 43% MANAGERS, 18% SERVICE PROVIDERS

- Ullico Canada Marketing Services, Inc.
- University Pension Plan Ontario
- Virgo Digital Asset Management Inc.
- Walton Global
- Wellington-Altus Private Wealth
- Wilshire
- WonderFi
- Yardi Canada Ltd.
- Yorkville Asset Management

Special Thanks to our 2025 Gold Partners



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

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