



CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

CAASA'S 2026 WEALTH MANAGERS' FORUM

Sponsorship Guide

SPONSORSHIP LEVELS

MEMBERS ASK - WE DELIVER

We strive to deliver the most compelling conferences & events, inspired by your feedback. Elevate your event experience, and join us in 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 5 & 6 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 5 & 6 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 5 & 6 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 5 & 6 respectively).

SPONSORSHIP LEVELS

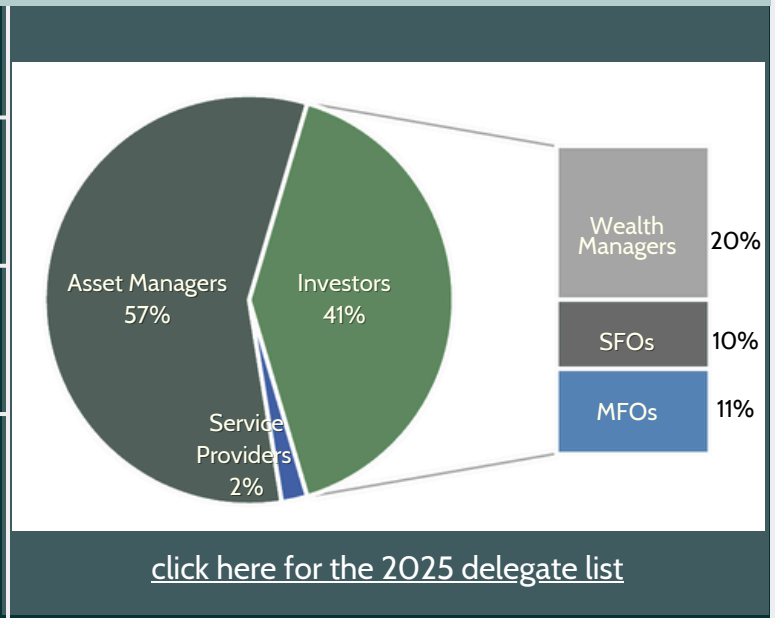
Complimentary Booth at all CAASA conferences attended					
Plantinum Sponsor banner at all 2026 CAASA events					
Gold Sponsor banner at all 2026 CAASA events					
One Complimentary Title Sponsorship					
Discounted Title Sponsorship			25 - 50% Disc		25-50% Disc
Program Sponsor with logo on front cover 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 13)					
Complimentary additional sponsor item (page 14)					
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



DELEGATE REGISTRATION FEES

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

Investors	Complimentary
Members of CAASA Asset Manager & Service Providers	\$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

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):

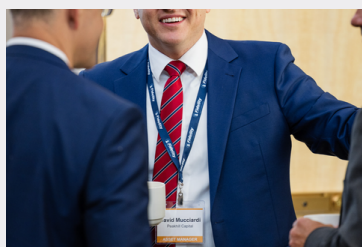
These exposure items are apportioned on a first-come basis to members as they commit to sponsoring the event. Platinum Sponsors have first call on any remaining item from when they commit to that level of sponsorship and Gold Sponsors have next call on any remaining item once Platinum Sponsors have had 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....

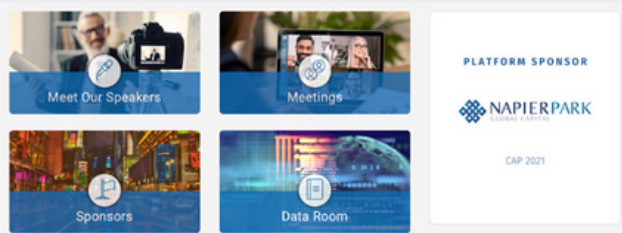
ENHANCED SPONSOR EXPOSURE ITEMS

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....

Program (\$1,500)

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

Special Thanks to our 2025 Gold Partners



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

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