



CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

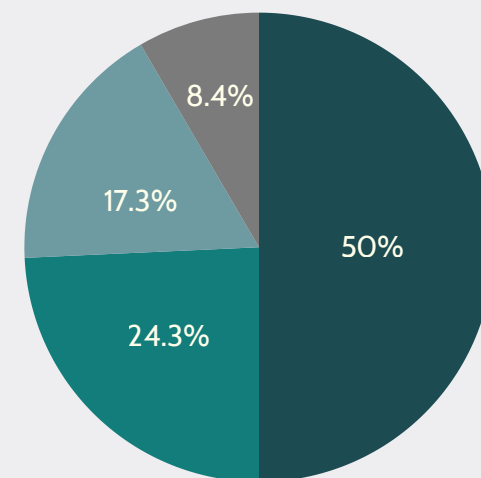
BRINGING CANADA TO THE WORLD AND THE WORLD TO CANADA

January 1, 2026 Edition

TOTAL NUMBER OF MEMBERS

416

Asset Managers	208
Founders	35
Service Providers	72
Investors	101



ABOUT CAASA

The Canadian Association of Alternative Strategies & Assets was formed to bring together alternative investment managers and investors, along with service providers, in a setting conducive to information sharing, discussion and networking, and collaborative initiatives.

ABOUT CAASA

INCLUSIVENESS

CAASA represents a broad cross-section of public and private market participants whose offerings are distributed to true retail, Accredited Investor retail, family offices, endowments, foundations, public and private pension plans, and sovereign wealth funds.

Public markets include hedge / alternative strategy asset managers such as managed futures / CTAs,

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long-short equity, equity market neutral, credit and fixed income funds with varying exposures and arbitrage strategies, multi-strategy, special situations, and others that deal in predominantly public / readily priced /quoted markets.

Private markets include private lending (from factoring and revolvers to longerterm financing), direct and fund-structured real estate and development investments, private equity (including PE debt and PE real estate), alt alts such as weather derivatives, and other areas that may not be readily priced / valued.

ABOUT CAASA

MEMBER BENEFITS

For Investors – A network of pension plans, foundations, endowments, sovereign wealth funds, and family offices to network with on a formal and casual basis as well as resources for analyzing managers and services providers.

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For Managers – Peer connection in areas such as fund structuring, sales & marketing, and regulatory issues. Access to investors (opt-in for investors) as well as exposure through panels and conferences targeted to particular groups

For Service Providers – Relevant working groups, event participation / sponsorship, industry thought leadership, and interaction with a wide crosssection of manager and investors.

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For Start-up Founders - A diverse network of peers and investors (SFOs and VC shops) that can power one's plans from start-up and beyond.

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For All – Through our partnerships with the the Professional Centre and the CAIA Association, CAASA Classroom sessions and discounted space as well as access to CAIA's Alternative Investment Analyst Review and discounts on both courses.

ABOUT CAASA

FROM LOCAL TO GLOBAL – AND BACK AGAIN

CAASA's activity is in all areas of Canada, from larger asset management hub, to those with major / a concentration of investors, to others where service providers congregate. Examples include: Toronto, Montréal, Québec, Halifax, Ottawa, Vancouver, Victoria, Calgary, Edmonton, and Winnipeg. It is important for a truly national organization to be engaged in all aspects and regions – and being present in these areas leads to important market intelligence and the ability to tailor CAASA's offering as well as provide insights to its members and stakeholders.

CAASA strongly believes that Canada is a leader in many areas of investment management and can learn from other countries' experts as well and providing domestic and foreign / overseas opportunities where global professionals and organizations can meet and exchange best practices & policies and work together on current issues and trends.



CAASA organizes major conferences in Canada and other events and forums elsewhere.

We treat all members the same:
all have access to all services &
we do not promote one member
above another.

ABOUT CAASA

GOVERNANCE AND STRUCTURE

CAASA was created and is controlled by the membership and local staff for the benefit of members and the Canadian alternatives industry at large.

The association's Member Advisory Panel (MAP) works with its staff in formulating and adapting overall strategy, new and continuing initiatives, event and conference themes and formats, and creation of various Member Initiative Groups (MIGs) that focus on particular aspects and/or geographical areas in the Canadian alternatives industry.

CAASA staff are tasked with attending each meeting of the MAP and MIGs, providing logistical, thematic, format, and other support relating to the execution of its activities

All meetings and activities are governed by the principles of inclusiveness, collaboration, fairness, and elucidation.





CAASA'S ACTIVITIES

CAASA's Activities

CAASA serves and represents the alternatives industry in Canada by engaging in member-lead local and national initiatives in advocacy; investor, manager, and industry best practices & policies; committees and working groups dedicated to broad mandates as well as those uniquely Canadian and in areas of national or regional expertise; and production of thought leadership events, publications, and initiatives affecting the Canadian and global alternative investment landscape.

CAASA'S ACTIVITIES

Liquid Alts Data & Report

Second engine (a division of Picton Investments) creates a report on the Canadian liquid alts industry each quarter which we provide to all the public (members can access previous period reports).

Primers on Topical Subjects

Each year we produce two to four primers (found on our Publications page) that are written by an external (non-industry) writer and drawing from interviews with our participating members. These are intended for investors who are investigating a particular subject and run the gamut from real estate and private lending to quant strategies and digital assets. The cost to participate (which is intended to cover costs) is \$3,000 per member. A maximum of 8 members (minimum of 4) may be involved in any one paper.

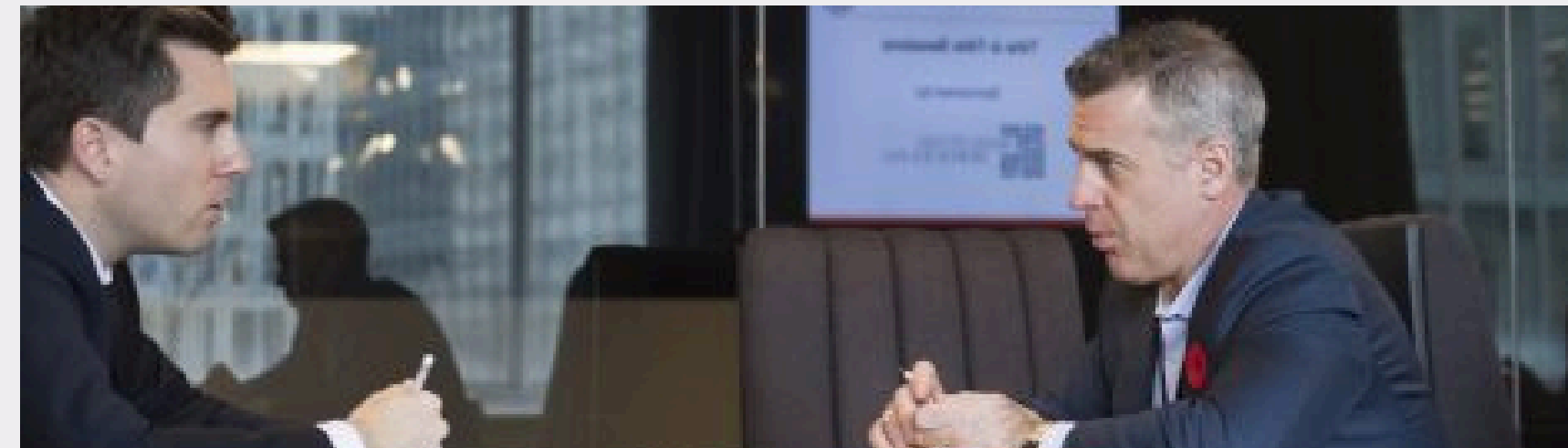


Areas of activity

CAASA'S ACTIVITIES

Diversity and Engagement

Alternative asset management often involves the creation, implementation, and monitoring of new and sophisticated trades, strategies, and asset classes. Being open to the best minds available allows the industry to innovate as well as take advantage of opportunities. Career panels, stock/idea pitch competitions, and other events aimed at students and particular groups will enhance our industry's place in career paths.



Prudent Processes & Policies

Providing input from leaders in operational and compliance roles at institutional investors, investment funds, and service providers and consultants, members and the public will receive 3P publications, panels and roundtables, and other programming to enable them to better comply with regulatory changes and investor requirements and preferences.

COLE'S NOTES OF DIFFERENTIATORS

What we do and do not do

Our business plan is centred around privacy, catering to investor preferences, and opt-in formats as much as possible.

- **Speaking opportunities are invite-only.** We do not engage in pay-to-play; we draw speakers from membership only (unless a pension, SFO, or non-industry speaker); we ask that all participants NOT mention returns or specific products, and focus on the theme/topic of the panel/question.
- **We prefer having investors on panels** (since we are not monetizing them) – as such, manager & service provider members should not assume a set number of speaking opportunities when joining/renewing. We also do not entertain a notion of joining/renewing on the pretext of speaking.
- **We are not a cap intro team:** we do not guarantee a certain number of meetings; we do not provide introductions (unless requested by investors); and we do not have a listing of all investors and what they are looking for. We provide venues/platforms where folks can meet and communicate.
- **We do not share anyone's contact information** (unless already public in the member directory).
- **We strive to have a mix of** 40% investors, 40-50% managers, and 10-20% service providers at our conferences.
- **We do not get a member an audience** for a lunch & learn, although we can promote it via our events blasts.

Conference Programs

Our Family Office Summit, CAASA Annual Conference, Wealth Managers' Forum, and CAASA Alternative Perspectives conferences all include a program detailing the events speakers and schedule as well as a complete member directory including contact information (as applicable).

Annual Review

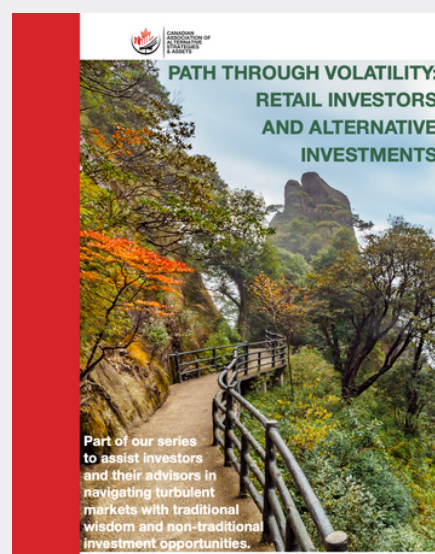
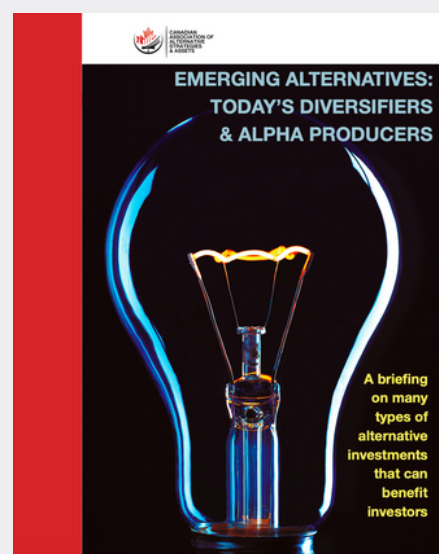
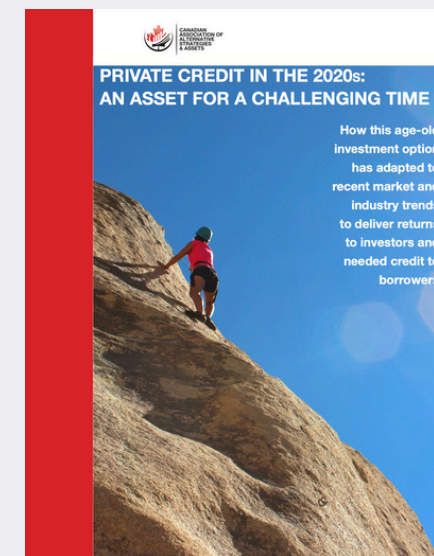
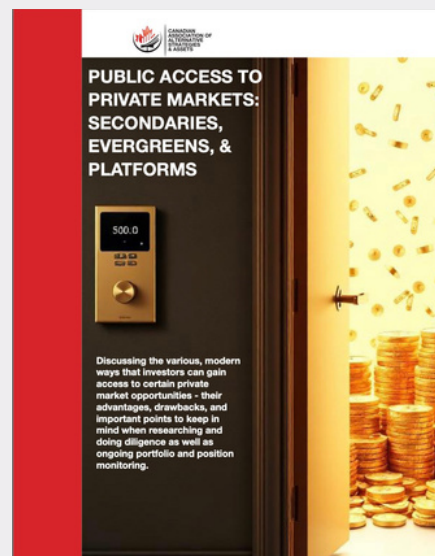
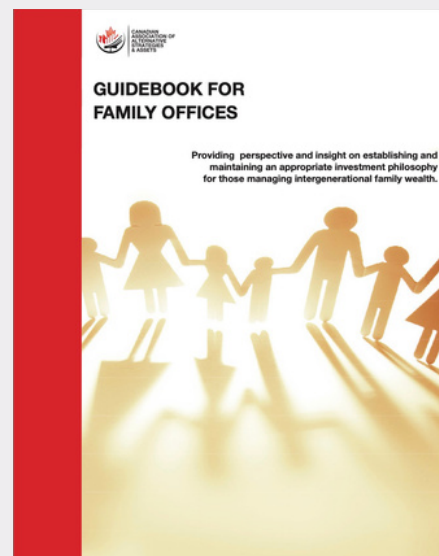
Around January 7 each year we publish our Annual Review with a comprehensive listing of all CAASA members in each category as well as a full listing of all of our activities of the previous year.

OUR PLANNING DOCUMENT

To allow members to plan their year effectively, we produce our Planning Doc on about August 1 of each preceding year. This gives ample time for members and those looking to get involved with our association time to gain necessary approvals, plan travel and other arrangements (e.g., swag), and ensure their key personnel are available for these high impact events.



A PLETHORA OF THOUGHT LEADERSHIP PIECES



**...MORE
TO COME!**

ANNUAL RETROSPECTIVES AVAILABLE ONLINE



CAASA PARTNERSHIPS

CAIA Association

We partner with many associations, but CAIA is close to our hearts as it is analogous to CAASA (pan-alternative) in the educational realm. All CAASA members have access to the Alternative Analyst Investment Review, CAIA's quarterly digital research digest and enjoy 10% off the CAIA charter exams (excluding the registration fee, about 200 hours of study x 2 levels) and USD200 off CAIA's fundamentals course (approximately 20 hours of study).

The Professional Centre

This serviced office floor is home to the CAASA offices and is available for our events and meetings.

Members looking for flexible, new, and affordable space in the core get an extra discount.



CAASA'S PARTNERSHIPS

**Managed Funds Association
Partnership Program**



Since 2021 we are a part of the MFA Partnership Program along with a great many regional alts associations such as: Connecticut Hedge Fund Association, New York Alternatives Roundtable, Palm Beach Hedge Fund Association, South-East Alternative Investment Association, Mid-South Alternative Investment Association, Texas Alts/Alternative Investment Association, CalAlts, and others as added throughout the year.

Unlike our peers which rely on volunteer staff, we do not make use of the MFA's mighty infrastructure to plan our events, but we regularly connect with the MFA and participating associations to better execute on our individual mandates (CAASA's is to bring Canada to the world, and the world to Canada).

Healthy finances allow any organization to run at peak efficiency for all involved. As a non-profit organization, CAASA does not pay income tax, but does remit payroll, sales / HST, and other taxes as required by law. Staff have experience in these processes, which will be overseen by the Member Advisory Panel. An annual audit will be performed, the results and management discussion available to the membership.

CAASA's annual fee schedule was established to be as fair and equitable as possible for all members. Future iterations of the fee schedule will be determined by staff and the MAP and, in some instances, by or with input from broader membership.

Manager AUM for dues purposes is calculated on alternative AUM including hedge, real estate, private lending, and private equity.

BACK OFFICE

Our Fees and Accounting

FEES

Fee Schedule (v2023.1)

Asset Managers (in CAD millions)

<\$50	\$50-\$100	\$100-500	\$500-\$1,000	>\$1,000	Long-only
\$1,500	\$2,500	\$3,500	\$5,000	\$6,000	\$1,450

Other Members

Prime Brokers, Legal, Admin & Audit	Other Consultants, Exchanges	Wealth Managers & Dealers (50+ reps)	Family Offices, Institutional Investors, & Wealth Managers & Dealers (<50 reps)
\$5,900	\$2,450	\$1,300	\$600

Founders of Start-Ups may join as a corporate unit for \$200 per year. If in a competitive category of endeavour, Founders will be required to upgrade to Consultant or as applicable once out of start-up phase, as determined by CAASA. Founders category not available to Asset Managers.

Fees will be processed as listed plus applicable taxes.

ADDITIONAL FEES/EXPENSES

In addition to annual membership dues

While podcast, webinar, and conference speaking opportunities are without additional cost, members should expect to incur the following expenses associated with being active in the community/events:

- Conference delegate passes – these range from \$1,250 to \$3,250 per person (for managers and service providers) for our flagship conferences and usually \$1,000 per person for our other conferences. Some investors might be required to pay an additional fee. Speakers are comp but ALL additional attendees need to have their own delegate pass. Delegate passes purchased within 30 days of a conference date will attract a \$250 per pass processing fee.
- Conference sponsorship – in 2024 this is \$3,500 - \$5,000 per conference and includes a Table Talk, 1/2-page ad in the program, and additional exposure; a lower-cost option is available for those who do not want to have lead a Table Talk. Sponsorship **DOES NOT** influence invitations to speak.
- Socials – Most socials have a cost to attend. We find this makes people attend and defrays production costs.
- Papers & Primers – We produce 2-4 each year. Cost is \$3,000 per member (4-8 members only) which is allocated to our external writer and printing 1,000 copies to be distributed at our conferences and in info packages (also available online). We invite members to participate in certain ones and are open to suggestions for future topics; all can be found on the Publications page of our website.

MEMBER DIRECTORY

Investors and Allocators

AIMCo
Aksia LLC
Albourne Partners
Aligned Capital Partners
Artemis Investment Management
Atlas One Digital Securities
August Group (MFO)
Axxess Capital Group
Barber & Associates (SFO)
BCI
BDO Family Office Practice
bfinance (MFO)
BNQ Group
Beta Partners
Bodhi Research Group
Caledon Hills Private Wealth/ IA Private Wealth
Capstone Asset Management (MFO)
Carte Wealth Management Inc.

Chandaria Family Holdings (SFO)
CI Coriel Capital Inc
Cidel (MFO)
Citi Private Bank
Designed Securities
Eckler Ltd.
Fipke Group
First Affiliated Holdings (MFO)
Forthlane Partners
FutureSight Ventures (SFO)
Guardian Partners Inc
Hadley Family Office
Harbourfront Wealth Management
Healthcare of Ontario Pension Plan
Horizon Capital Holdings (SFO)
INKAS Group of Companies
Jisrak Research
Kiwitech (SFO)
M.Y. Capital Management
Mandeville Private Client
Master Plan Management (SFO)
McPike Global Family Office
Mercer
Morgan Stanley Wealth Management

Northwood Family Office (MFO)
Numus Financial
Nvestiv
Ontario Teachers' Pension Plan
OPTrust
Our Family Office (MFO)
Pandion Investments Limited
PBY Capital Ltd.
PortfolioHiWay
Prime Quadrant (MFO)
Raymond James Ltd.
RBC Dominion Securities
Richardson Wealth
Richter Family Office
SAGANA
Spotlight Development (SFO)
StepStone Group
Stonehage Fleming (MFO)
Sterling Family Capital Advisors
VRG Capital
Wellington Altus
Westcourt Capital Group (MFO)
Westmount Wealth Management
Zen Capital & Mergers (SFO)

MEMBER DIRECTORY

Asset Managers

3iQ Digital Asset Management
AE Industrial Partners
AGF Investments
Algonquin Capital
Algoz
AltEx Capital
Alphemy Capital
Anacapa Advisors
Antrim Investment
AP Capital MIC
Apogem Capital
Apollo Global Management
AQR Capital Management
Arch Capital Group
Ardian
Area One Farms
Asset Management One USA Inc.
Avenue Living Asset Management
Aviva Investors

Avondale Private Capital
Axonic Capital LLC
BAC Securities
Bain Capital
Benefit Street Partners
Bermuda Asset Management
BMO Global Asset Management
Calvert Home MIC
Cameron Stephens
Canadian Mortgage Capital Corp.
CanFirst Capital Management
Canyon Partners
Capital Direct Management Inc.
Capital Fund Management
Celernus Investment Partners
Centurion Asset Management
CF Private Equity
City Flats
Clear Skies Investment Management
Clifton Blake Asset Management
CMCC Global
CMI Financial Group
Cohen & Company Asset
Management
Coinbase Asset Management

Coller Capital
Conner, Clark & Lunn Funds
Consilium Crypto
Contango Digital Assets
Converium Capital
Crescero Natural Capital
CrossLayer Capital
Diagram Ventures
Delbrook Capital Advisors
Drakewood Capital Management
Duke Capital
Durum Capital
Equiton Capital
Espresso Capital
Farm Lending Canada / AgriRoots
FAX Capital
Federated Hermes Private Markets
Fidelity Canada Institutional
Fieldhouse Capital Management
FirePower Capital
Firinne Capital SEZC
Forum Asset Management
Frankforter Group
Franklin Templeton Investments
Fulcra Asset Management

MEMBER DIRECTORY

Asset Managers

GB Wealth
Glengarry Farm Finance
Global X ETFs
Graham Capital Management
Greyhill Capital Partners
HalBar Partners
Heartwood Trust
HGC Investment Management
Highline Beta
iCapital Network
ICICI Bank
INP Capital
Inverted Ventures
Invesco
IronGate Capital Advisors
JM Fund Management Inc.
J. Stern & Co.
Kayne Anderson Capital Partners L.P.
Kazana Capital

Keystone Farmland Management
Kuber Mortgage Investment Corporation
Leith Wheeler Investment Counsel
Letko Brosseau & Associates
Lexington Partners
LGT Capital Partners
Lighthouse Funds India
LION-S
Lombard Odier Investment Managers
Longridge Partners Inc.
Luminary Capital
Mackenzie Investments
March Altus Capital Management
Maverix Private Equity
Mawer Investment Management Ltd.
Maxam Capital Management
Maynebridge Capital
Metori Capital Management
Morex Capital
Murchinson
Music Royalties Inc.
New Holland Capital, LLC
New North Ventures
Next Edge Capital
Ninepoint Partners LP

Northside Ventures Management
Nymbus Capital
Obsiido Alternative Investment Inc
Omnigence Alternative Investments
Owemanco Mortgage Trust
OZ Capital
Partners Group
PenderFund Capital Management
Peninsula Capital Corp.
Picton Investments
PlusPlus Capital Management
Pontoro Inc.
Quantica Capital AG
reDeFi Capital Management, LLC
ReserveOne
ReSolve Asset Management
Robson Capital Management
Ruffer
Saltgrass Capital
Sagard Holdings
Sarena Asset Management
Sectoral Asset Management
Sentiero Ventures
Skyline Wealth Management
SLGI Asset Management

MEMBER DIRECTORY

Asset Managers

Spartan Fund Management
Star Mountain Capital
Steepe & Co. Capital
Stronghold Asset Management
TD Asset Management
TerraGen Technology Group Inc.
Terreplein
Tetragon - TGF Asset Management
Theia Partners Inc.
Trans-Canada Capital
Trez Capital
Triovest Realty Advisors
Vesta Wealth Partners
Viewpoint Investment Partners
Virgo Asset Management
Virtus Financial Group
Walton Global
WATT Transactional Fund

WaveFront Global Asset Management
Wealhouse Capital Management
Wealthsimple
Wellington Investments
Wilshire
Winton Capital Management Ltd.
Yorkville Asset Management
YTM Capital Asset Management

MEMBER DIRECTORY

Service Providers

Altrust Investment Solutions
Apex Fund Services
AUM Law / BLG LLP
Battea Class Action Services
Biricz Taylor Investments Inc.
BridgeMe Securities
CAIA Association
Canadian Bitcoin Conference
Castle Hall Diligence
CBRE Investment Banking
CIBC Mellon
Climate Finance Advisors
CME Group
Coinsquare
Composer Technologies
Corpay Cross Border
Dicello Levitt LLP

Electra Capital Advisors Ltd
Enfusion
Federation of Mutual Fund Dealers
FIAM - Forum d'investissement alternatif de
Montréal
Flowpoint Technologies
Fundata
Hedgefacts International LLP
Innocap
IFDS
KPMG
Massey Henry
McMillan LLP
Miller Thomson LLP
MillTechFX
Mirae Asset Securities (USA) Inc.
MyFO
NASDAQ
Ndex Systems Inc.
Norton Rose Fulbright
Oak House Advisors
Perth Advisors LLC
Preqin

RBC Investor Services
RSM Canada
Sage Software
SB Advisors
Scientific Infra & Private Assets
SGGG Fund Services
Skyservice Business Aviation
Sofistic.ai
Sotheby's International Realty
Squire Patton Boggs
SS&C Technologies
Systemic Trust Company
Tetrix
TMX Group
Yardi Canada Ltd.

MEMBER DIRECTORY

Start-Up Founders

Alphablock Technologies
Aquaporin
Argo Digital Gold Ltd.
BILI Inc. (Because I Love It)
Cansulta
Cityzeen
Civiquant
DentalForce
Econommi
Edsoma, Inc.
FN Immersive Innovation
LEAP Strategy Partners
LexiComply
Liso

Liven
Neuraura Biotech Inc.
One-Shot LP
Quadlii XG
SAOS HOMES
Sibli
Telemetrak, Inc.
thisPantry
UinSports Inc.
Urbanate Inc.
Versa Materials Technology
Virtual Film School
Workforce Wellness Inc.
XOSQE Inc.

CAREER PANELS & STOCK PITCH CHALLENGE

Career Panels

Panel of 3-5 industry professionals including portfolio managers, operating officers, prime brokers, fund administrators, family office and institutional investor personnel from investment and operational due diligence, as well as other service providers.

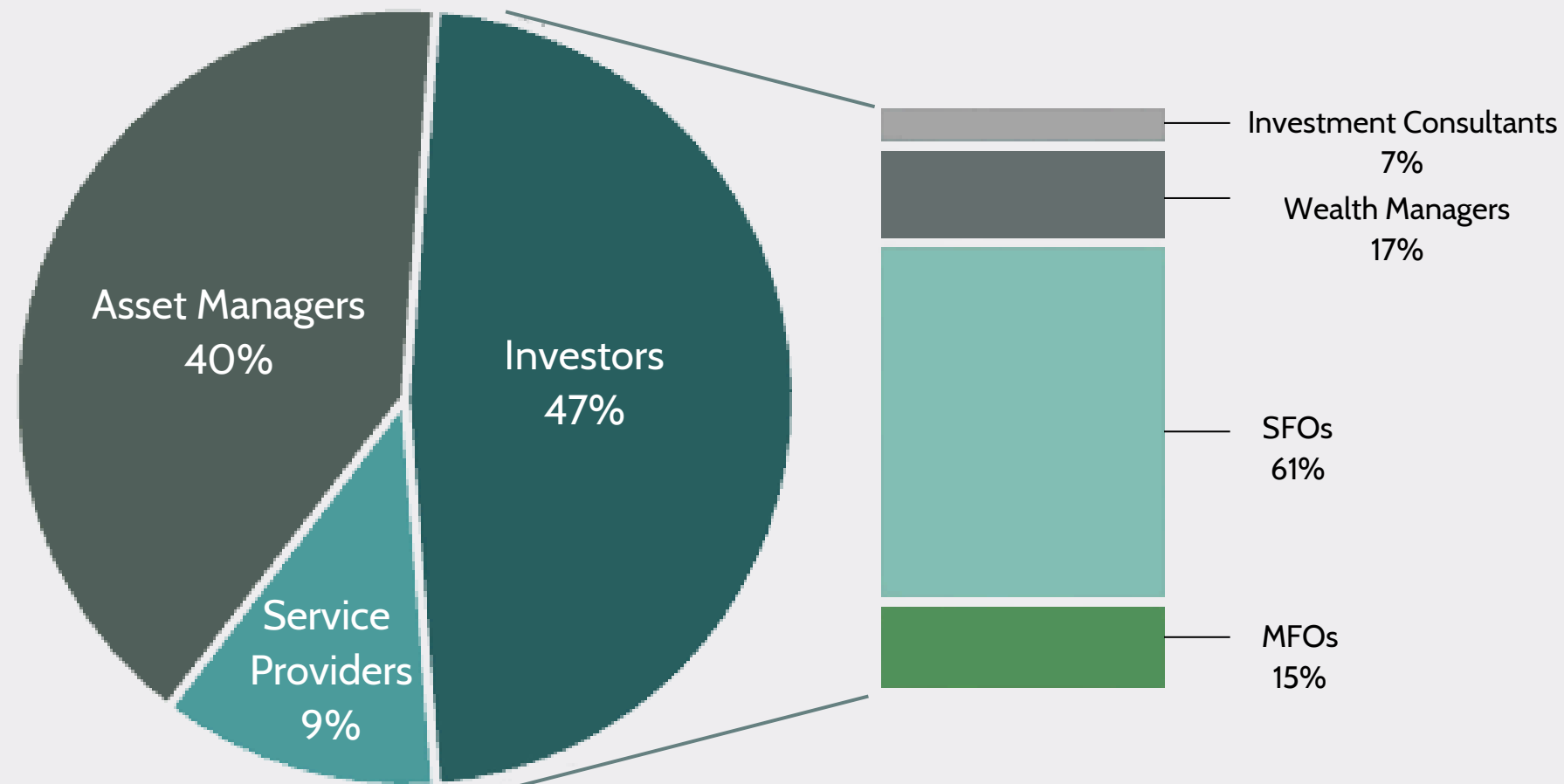
Stock Pitch Challenges

Panels of 3-7 portfolio managers critique student stock (or strategy) pitches.
Prizing typically winning team(s) have a night out with 10-20 industry professionals (portfolio managers, investors, and service providers).

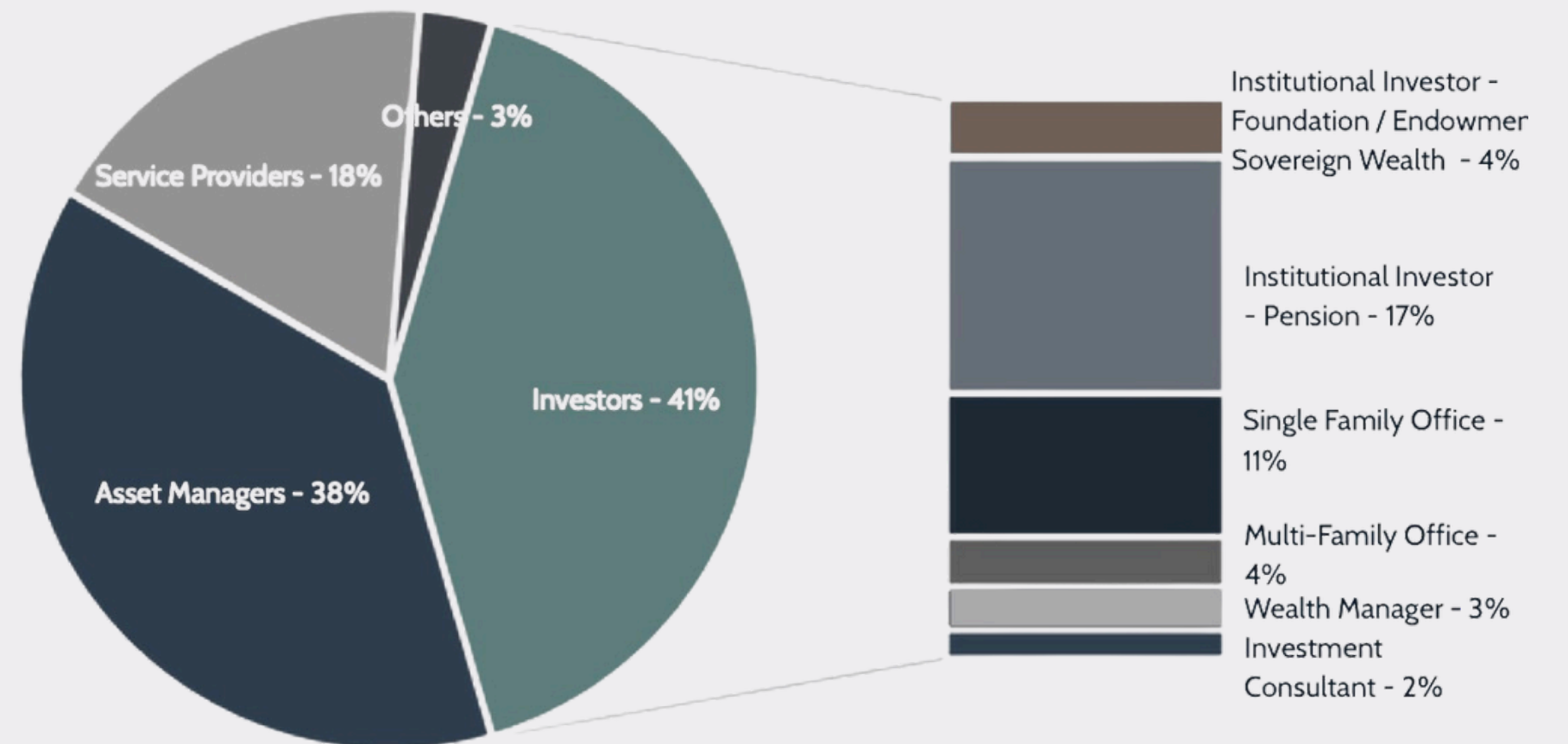
Held at campuses across Canada and Downtown Toronto.

QUALITY CONFERENCE AUDIENCES

Family Office Summit 2025



CAASA Annual Conference 2025



2025 EVENTS

Q1

The Francis Sabourin Hour with Forum Asset Management (Jan 23)
Humber College Career Panel (Feb 5)
Important Takeaways from the Cormark Securities Decision (Feb 6)
The Francis Sabourin Hour with Collier Capital (Feb 18)
University of Geneva Career Panel (Feb 27)
University of Manitoba Career Panel (March 10)
University of Regina Career Panel (March 11)
University of Calgary Career Panel (March 12)
University of Alberta Career Panel (Edmonton, March 13)
Simon Fraser University Career Panel (Vancouver, March 14)
The Francis Sabourin Hour with Stormont Partners Capital (March 20)
University of Toronto Masters of Financial Insurance Career Panel (March 26)
Wealth Managers' Forum (March 27)
University of Toronto Scarborough Career Panel (March 6)

2025 EVENTS

Q2

CAASA Cocktails with Agecroft Partners (April 2)
The Francis Sabourin Hour with Partners Group (May 15)
Family Office Summit (Toronto Board of Trade, April 23-24)
May Networking Night at Ki (May 6)
Start-Up Round-Up (May 12)
Francis Sabourin Hour ft. Partners Group (May 14)
West Coast Mixer (May 26)
Closing of the NASDAQ in Times Square (June 3)
University of Toronto Masters of Mathematical Finance Career Panel (June 4)

Q3

2025 EVENTS

CAASA @ Stampede - Bootleggin' Breakfast (Calgary, July 8)
Montreal Networking with CAIA (July 9)
The Francis Sabourin Hour ft. Evovest
CAASA Invitational Golf Day (Angus Glen G.C., July 28)
July Networking Night at Ki (July 29)
11th Annual Méchoui with FIAM (Aug 21)
University of Toronto (Scarborough) Career Event (Aug 5)
12th Annual Méchoiu in Montréal (Aug 22)
Vancouver Baseball night at Nat Bailey Stadium (Aug 24)
Humber College Int'l Graduate School Career Fair (Aug 26)
August Networking Night at Ki (Aug 26)
Annual AML and ATF Training for Registrants (Sept 8)
CAASA Digital Assets Day (Sept 16)
CAASA Alternative Perspectives: Private Market Focus (Sept 17)
Apex Invest Breakfast at the Cambridge Club (Sept 18)
The Francis Sabourin Hour ft. Sagard Holdings (Sept 24)

Q4

2025 EVENTS

CAP YVR: Demystifying family offices (Oct 1)
CAP YYC: Breakfast with family offices (Oct 2)
October Networking Night at Ki (Oct 7)
CFA Winnipeg & Saskatchewan Career Panel (Oct 15)
University of Guelph Career Panel (Oct 28)
Ontario Tech University Career Panel (Oct 29)
University of Toronto Masters of Mathematical Finance Career Panel (Oct 30)
CAASA Annual Conference - Montréal (Nov 4-5)
UofT QFSA Investment Challenge Awards Night (Nov 13)
FATCA/CRS Back to Basics and Recent CRA Enforcement Activity (Nov 26)
Montréal All-Industry Holiday Social (Dec 2)
Toronto Holiday Social with CAIA (Dec 3)

Trustee Series Conference (Key West, Jan 21-24)
MFA Network (Miami Beach, Jan 27 – 30)
Sotheby's Overseas Real Estate (Dubai, Feb 10)
Apex Invest (Riyadh, Feb 11-12)
Carmo Secondaries (Santa Monica, Feb 12-13)
K2MATCH Invest (Monaco, March 5-7)
CalALTS Wine Tasting (Los Angeles, March 18)
Virgo Crypto Summit (Vancouver, April 4)
GAIMOps (Grand Cayman, April 6-9)
Apex Invest (Grand Cayman, April 9-10)
[Re]Connect by CIRCA (Grand Cayman, April 10-11)
MFA Alpha-Generation Symposium (April 22)
CFA Montréal Innovation in Finance Forum (April 29)
Bodhi Research Group Symposium (May 8)
Apex Invest Singapore (May 18-20)
AIM Summit (London, May 19-20)
Talking Hedge (Austin, May 20-21)
Carmo Canada Private Markets (May 22)
Web Summit Vancouver (May 27-30)
Federation of Investment Dealers' Annual Conference (June 2)

2025 THIRD-PARTY CONFERENCES & EVENTS

Participation/Attendance

Wealth Professional Magazine Awards Gala (June 6)
Greenwich Economic Forum - London (June 10)
Luxembourg Private Equity & Venture Capital Association AGM - Luxembourg (June 11)
Canadian Annual Derivatives Conference (Montréal, June 17-18)
Global Infrastructure Dialogue - Frankfurt (June 17-18)
Tom Brigandi Summer Social (June 26)
From Idea to Empire: The Venture Studio by FutureSight (June 25)
Bitcoin Rodeo - Calgary (June 28-29)
CAIA - Unleashing Opportunities: A Night of Connections and Scientific Insights on
Private Assets - Luxembourg (July 2)
CAIA Germany - New Developments in German Direct Lending - Frankfurt (July 3)
CAASA & CAIA Summer Social (Montréal, July 9)
CAIA Summer Social (Chicago, July 14)
Institutional Conference (Miami, July 16-18)
Carmo D.C. Private Markets Meeting (June 17)
Carmo California Private Markets Meeting (Sept 11)
Bay Street Bounce for SickKids Hospital (Sept 11)
MoneyShow (Toronto, Sept 12-13)
Apex Invest Lausanne (Sept 22-24)
CAIA Geneva: The Great Convergence (Sept 22)

2025 THIRD-PARTY CONFERENCES & EVENTS

Participation/Attendance

IPEM Paris (Sept 25-26)
Greenwich Economic Forum - CT (Oct 6-8)
CAIA Atlanta: Insights into Alternative Manager Due Diligence (Oct 9)
CIBC Mellon Student Investment Fund Event (Oct 14)
Canadian Bitcoin Conference - Montréal (Oct 16-18)
AIM Summit Dubai (Oct 21-22)
Talking Hedge Nashville (Oct 22-23)
The Hinton Lectures (Nov 23-25)
Apex Invest Abu Dhabi (Nov 24-25)
Carmo Private Markets Meeting East (Dec 4)
CAIA Chicago Holiday Social (Dec 18)

2025 THIRD-PARTY CONFERENCES & EVENTS

Participation/Attendance



James Burron
Founding Partner

Paul Koonar
Partner

Manya Thakur
Member Services

Stanley Tow
Accounting
