



CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

PRESENTED BY: THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

WEALTH MANAGERS' FORUM 2026

TUESDAY, MARCH 24





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Winner at the 2025 Canadian Hedge Fund Awards - Mortgage Fund



10-YEAR RETURN



1-YEAR RETURN

2025 Annual Returns⁽¹⁾

Class F⁽²⁾
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Class C
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Class A
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(1) Compounded annual rate of return as at December 31, 2025 is based on income produced by that class of Units of the Trust, including reinvested dividends and net of fees and expenses, after any discretionary reduction by Management in Income Participation. (2) Class F Units must be purchased through a third party dealer and are intended for managed accounts.

All investments carry risks and past performance is not an indication of future returns. This does not constitute an offer to the public to subscribe for units of the Trust. This document does not provide disclosure of all information required for an investor to make an informed investment decision. All subscriptions for the purchase of units must be made pursuant to available prospectus exemptions. Investors should read the current offering memorandum, especially the risk factors relating to a purchase of Units of the Trust, prior to making an investment decision.



YOUR SOURCE FOR ALL THINGS ALTERNATIVE

Welcome to our conference series focused on the requirements and preferences of retail, HNW, and UHNW Investment Advisors and allocators. We specially designed each city's program to reflect their particular preferences and have (what we believe to be) a balance of talks from seasoned Investment Advisors and asset managers. Our format reflects the high value you put on your time – we start in the morning with our investor only sessions and end with a reception – and appreciate your taking time to attend the conference.

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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 backdrop 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!



The industry's
end-to-end platform
for alternative
investments.

LEARN MORE



Certain products and services can only be offered by the appropriate entities and only in jurisdictions where they may be lawfully offered. In Europe, certain securities products and services are offered by Institutional CN (Europe), Empresa de Investimento, S.A., registered with CMVM, and iCapital UK Services International, authorized and registered with the FCA, affiliates of iCapital. In Asia, products and services are offered by iCapital SG Pte. Ltd and iCapital Hong Kong Limited, regulated by MAS and SFC respectively.

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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.

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, March 23rd 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, March 23rd to ensure a table is not fully-booked, or delegates can simply sit at any of the open tables at those times.**

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WEALTH MANAGERS' FORUM 2026

Tuesday, March 24th AGENDA

9:00 AM	Advisor registration Please note that 9am – 10:30am is exclusive to Advisors (including Investment Advisors, MFOs, and SFOs). Asset managers and service providers are asked to register at 10:30am. None will be admitted before that time.
9:30 AM	Manager Diligence / Scaling up Your Book/Adding Alts (Investment Advisors, Single Family Offices, and Multi-Family Offices Only Session) Due to popular demand, we have organized a special advisor/allocator (IAs + select MFOs and a few SFOs) session to kick off this year's Wealth Managers' Forum. We know that IAs have numerous training programs from fund companies and their employers and this one is designed to augment that with views from the industry at large. We will cover: adding alts to your book, scaling up your book, and manager diligence as well as any topics the group would like to discuss - then we have an afternoon of even more insights!
10:30 AM	General Registration & Coffee Asset managers and service providers are welcome to register at this time.
10:45 AM	Case Study: Adding Alternatives to Client Portfolios Alternative investments are increasingly becoming a core component of client portfolios, yet the path to incorporating them is rarely straightforward. Advisors must navigate product selection, due diligence requirements, portfolio construction considerations, and client communication when introducing alternatives alongside traditional assets. In this NowTalk session, experienced wealth advisors will walk through a real-world case study on how alternatives are evaluated and incorporated into client portfolios. The discussion will explore how advisors determine the role of alternatives within portfolio construction, assess managers and structures, and communicate these strategies effectively to clients. Attendees will gain practical insights into the opportunities and challenges of integrating alternative investments into modern wealth management practices. Fardan Ali, Designed Wealth Management, Joseph Bakish, Manulife Wealth Inc.

WEALTH MANAGERS' FORUM 2026

Tuesday, March 24th - TABLE TALKS



Capital Direct Management Ltd.
An Alternative Approach to Fixed
Income



Gord Ross
*Regional Vice
President, Central
Canada*

Capital Direct I Income Trust offers a well-diversified portfolio of Canadian residential mortgages designed to deliver consistent returns and dependable income. Our unique approach was recognized at the 2025 Canadian Hedge Fund Awards in the Mortgages category, earning 1st Place for Best 10-Year Return and 3rd Place for Best 1-Year Return. Join our discussion to learn how our award-winning strategy supports Canadian investors.



iCapital Network
Facilitating Access to Leading
Managers for Private Wealth Investors



Tom Johnston
*Managing Director,
Business Head
Canada*

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.



Letko, Brosseau & Associates Inc.
Letko, Brosseau Emerging Markets –
An absolute return strategy without
private market liquidity concerns



Alex Letko
*Regional Manager -
Central Canada,
Portfolio Manager*



Todd Bannerman
*Senior Investment
Counsellor*

Find out how a traditional investment manager has been able to produce mid teen returns since fund inception in 2011 while limiting downside to one small annual loss over that period. Absolute returns without the need for leverage or hedging. Alex Letko presiding.



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Marc D. Succi
*Founder & Executive Director,
Mass General Brigham MESH
Incubator*

Healthcare is entering an AI-driven transformation. Dr. Marc Succi, Founder & Executive Director, Mass General Brigham MESH Incubator, Associate Professor of Radiology, Harvard Medical School will explore how artificial intelligence is reshaping diagnostics, care delivery, and hospital operations—unlocking significant investment opportunities across digital health, data infrastructure, and clinical AI.

WEALTH MANAGERS' FORUM 2026

Tuesday, March 24th - TABLE TALKS



AllMind AI

AI and the Future of Investment
Research: How Leaner Firms Are
Competing and Winning



Anwaar Malik

Chief Executive Officer

AI is only as good as the investor behind it. This session gives experienced teams a look at how AI helps you research faster, dig deeper, and make better decisions, so human judgment is amplified, not replaced. Walk away with actionable insights on how to integrate AI into your team's process and deliver institutional-quality outcomes, without the headcount of a larger firm.



Omnigence Asset Management

Canadian Farmland in Diversified
Portfolios

Canadian farmland provides exposure to a real asset supported by global food demand and long-term agricultural fundamentals. This session will explore farmland's history of consistent, attractive returns, low volatility, inflation resilience, and its role as a diversifying component within investment portfolios.



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Massachusetts General Hospital
Brigham and Women's Hospital
Mass Eye and Ear
McLean Hospital
Spaulding Rehabilitation



WEALTH MANAGERS' FORUM 2026

Tuesday, March 24th AGENDA

11:15 AM	Table Talks Round table discussions hosted by our Sponsors. This session is aimed at providing all event attendees with the ability to join in genuine knowledge exchange and discussion in a small group setting. Choose from any of the topics for these 45-minute sessions
12:00 PM	Lunch Lunch is served prior to our Luncheon Fireside.
12:30 PM	Lunch Keynote – The State of Advice in Canada: Is the Industry Built for the Future? The Canadian wealth management industry is facing a period of profound change. Advisors are expected to navigate a rapidly expanding universe of investment products, growing regulatory scrutiny, and clients who increasingly demand access to private markets and alternative strategies. Yet many of the structures that define the advice industry today were built decades ago. Compensation models, product distribution systems, and due diligence processes are being challenged as the investment landscape becomes more complex and investor expectations continue to evolve. Drawing on over two decades of experience as an advisor, portfolio manager, chief investment analyst, and consultant, Jesse Kaufman will offer a candid and sometimes contrarian perspective on the Canadian advice industry. From misaligned incentives and product proliferation to the realities of portfolio construction in today's markets, this keynote will explore whether the advisory profession is evolving fast enough and what the future of advice in Canada may ultimately look like. Jesse Kaufman, Mark Tower , Asset Management One USA
1:15 PM	1:1 meetings This is your opportunity to meet with your peers and gather important market intel from all participants. Meetings can be scheduled via our messaging and meeting app or ad hoc at this time.



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WEALTH MANAGERS' FORUM 2026

Tuesday, March 24th AGENDA

2:15 PM	CME on the Markets An update on the markets from one of the largest futures exchange on the planet from a veteran (and continuing student) of the markets. Mark Shore, CME Group
2:45 PM	The Evolving Shelf: How Access Is Changing The product shelf available to wealth advisors continues to evolve as access to private markets and alternative strategies expands. Head offices and investment advisors must now evaluate a growing range of structures designed to simplify access to historically difficult-to-reach managers and strategies. This panel will explore how firms are assessing newer product formats, including evergreen funds and fund-of-fund structures that provide exposure to top-tier managers through simplified subscription and one-trade processing. Panelists will discuss how these vehicles are being reviewed from a platform perspective, how they fit within advisor workflows, and what role they may play as private market access becomes an increasingly important part of client portfolios. Guillaume Lavoie, Torys, Brian Wong, Morgan Stanley Wealth Management, Tom Johnston, iCapital Network, Benjamin Sinclair, Designed Wealth Management
3:30 PM	Manager Perspectives: Building Alternative Strategies for Today's Market As demand for alternative investments continues to grow, asset managers are evolving how they design, structure, and deliver strategies to the wealth management channel. From liquid alternatives to private market vehicles, manufacturers must balance innovation, accessibility, and operational simplicity for advisors and their clients. This panel brings together leaders from diverse firms to discuss how alternative strategies are being developed for today's marketplace. Panelists will share how their firms approach portfolio construction, product structure, and distribution within the Canadian wealth channel, while offering their perspective on where demand for alternatives is heading and how managers are adapting to meet it. Ida Khajadourian, Richardson Wealth, Braiden Goodchild, Equiton, Rodrigo Gordillo, ReSolve Asset Management, Ash Tahbazian, 3iQ

WEALTH MANAGERS' FORUM 2026

Tuesday, March 24th AGENDA

4:15 PM	Reception Opportunity to network over food and drinks!
6:00 PM	End of Wealth Managers' Forum Toronto 2026! See you at another conference soon! Our Family Office Summit is April 28-29.

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!

SPEAKER BIOGRAPHIES

Fardan Ali

Vice President, Wealth Strategy & Advisor Enablement
Designed Wealth Management



Fardan is Vice President, Wealth Strategy & Advisor Enablement, where he works closely with advisors and leadership to develop platform strategy, investment solutions, and practice management initiatives that help advisory teams grow and serve clients more effectively. In his role, Fardan focuses on helping bridge the gap between investment managers, dealers, and advisory teams. His work includes evaluating investment solutions, supporting advisor education, and building initiatives that improve the advisor and client experience across the firm. Throughout his career, Fardan has conducted more than 200 branch audits, interviewed over 80 asset managers, and played a key role in hiring and developing talent. He is known for his practical approach to navigating regulation, product innovation, and advisor growth.

Joseph Bakish

Senior Wealth Advisor, Portfolio Manager
Manulife Wealth Inc.



Joseph Bakish is a Senior Wealth Advisor, Portfolio Manager at Manulife Wealth Inc. with over 20 years of experience in the field. Named Canada's Top Under 40 Investment Advisors in 2020 by the Investment Industry Association of Canada (IIAC), Joseph Bakish has built his career by putting the best interests of his clients at the forefront of his objectives.

Joseph recently joined Manulife Wealth to help expand their universe of alternative assets available for sale and to encourage the use and access of their capital markets team for retail investors. His experience at his previous firm, marked by an early adoption of alternative investments in portfolio construction, enables him to provide insight to the MW investment committee.

Bakish Wealth primarily deals with researchers and physicians as highlighted by the recent partnership with Heritage MD, a specialized advisory firm co-created with physician leadership to help physicians with their financial planning and asset allocation.

SPEAKER BIOGRAPHIES

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 tenure 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).

Rodrigo Gordillo

President
ReSolve Asset Management



Rodrigo is President of ReSolve Global* as well as Co-Founder and portfolio manager of the Return Stacked® ETF suite. Rodrigo brings nearly two decades of investment industry experience, specializing in developing innovative and diversified systematic investment strategies to a global clientele.

His expertise has been focused on the advancement of Return Stacking, All-Terrain portfolio construction, Managed Futures, and Systematic Global Macro strategies. Rodrigo has made significant contributions to the investment community through a series of insightful whitepapers, the book Adaptive Asset Allocation, the ReSolve Riffs Investment Podcast and The Get Stacked Investment Podcast.

Rodrigo's investment philosophy and approach are shaped by a journey that underscores the importance of resilience, adaptability, and a global perspective in mastering the complexities of dynamic markets.

SPEAKER BIOGRAPHIES

Tom Johnston

Managing Director, Business Head Canada
iCapital Network



Tom joined iCapital in 2020 as Managing Director and Business Head for Canada, based in Toronto. In this role, he is responsible for iCapital's expansion into the Canadian market, partnering with leading General Partners, alternative asset managers, and Canadian wealth channels, in addition to overall management of the Firm's business in Canada.

Prior to joining iCapital, Tom was previously the President of CI Institutional and CEO of UBS Global Asset Management (Canada) and has had prior roles in the past with Invesco and RBC. He has extensive experience business strategy, sales and servicing (both wealth and institutional) and new product development including a wide range of asset classes including alternatives. In addition to these roles Tom has also been a Chief Operating Officer, Chief Compliance Officer and General Counsel.

Tom is a trusted industry leader and has was the Vice Chair and board member of the Portfolio Management Association of Canada (PMAC) and previously (3 years) was also Chair of its Industry Regulations and Tax Working Committee. Tom earned a BA in History and Political Science from the University of Western Ontario and a Bachelor of Laws (LLB) from the University of Windsor. He remains a member of the Ontario Bar in good standing.

Jesse Kaufman



The Founder and CEO of Honest Advice Inc., Jesse Kaufman started his company with the goal of providing the truthful, professional, unconflicted advice investors have always wanted but were unable to get. He helps people sort through the noise that masquerades as advice, and shares exactly what they need to know and do to be successful in reaching their goals.

Jesse has over two decades of experience in wealth management as an investment advisor and portfolio manager for 13 years, an independent auditor of investment advisors' work, the Chief Investment Analyst at an independent wealth management firm, and a consultant at a major Canadian bank where he taught investment advisors how to do better work for their clients.

Holding a B.A. from York University, Jesse is a Chartered Alternative Investment Analyst, Chartered Investment Manager, Accredited Investment Fiduciary, and a Fellow of the Canadian Securities Institute. Known for his expertise in portfolio construction and alternative investments, he was named Best Advisor in the Country for Alternative Investment Expertise at the Canadian Wealth Professional Awards in 2016 and again in 2017.

SPEAKER BIOGRAPHIES

Ida Khajadourian

Senior Portfolio Manager, Senior Investment Advisor
Richardson Wealth



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

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

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

Guillaume Lavoie

Partner
Torys



Guillaume regularly represents fund managers and institutional investors on private fund formation matters, especially in connection with structuring open-ended and closed-ended private equity, infrastructure, debt, royalty and venture capital funds. His expertise on funds covers both institutional and retail products. He is notably one of leading experts in the country on access funds and other retail funds investing in alternative illiquid asset classes and with respect to rated-note feeder structures. He further has developed significant experience with the structuring of impact funds and other types of funds with an ESG focus or investment strategy. He also has significant experience representing nationally and internationally recognized private equity and institutional firms in private M&A transactions and equity deals across many sectors.

SPEAKER BIOGRAPHIES

Craig Machel

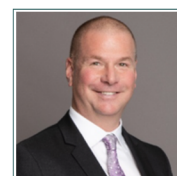
Portfolio Manager, Investment Advisor
Richardson Wealth



Craig encourages 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 and which includes 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 wealth management practices for various media outlets, and a panelist and speaker at industry events.

Allan Seychuk

Vice President & Senior Investment Director, Alternatives
Mackenzie Investments



Allan Seychuk is Vice President and Senior Investment Director and leads Mackenzie's Alternatives Team. In this role, Allan is responsible for product strategy and investment communications for Mackenzie's suite of Alternative Products. Prior to the launch Mackenzie's Alts business in 2019, Allan was the Senior Investment Director responsible for Mackenzie's Multi-Asset Solutions.

Allan joined Mackenzie in June 2015 from Mercer Global Investments, Mercer's multi-asset, multi-manager outsourced investments business, where Allan was the Head of Client Service for Mercer's Institutional clients across Canada.

Prior to Mercer, Allan spent seven years with Phillips, Hager & North Investment Management, where he was an Institutional Client Portfolio Manager and was responsible for macroeconomic research, asset allocation and investment strategy. Allan began his investment career as an Economist with RBC, where he conducted research and gave presentations on global macro and financial market developments.

Allan has undergraduate and graduate degrees in Economics from Queen's University and the University of Toronto respectively, and is a CFA Charterholder.

SPEAKER BIOGRAPHIES

Mark Shore

Director and Economist
CME Group



Dr. Mark Shore, Director, and Economist at the CME Group. He is responsible for generating economic analysis on global financial markets by identifying emerging trends, evaluating economic factors, and forecasting their potential impact on CME Group's various asset classes. He is a well-known alternative investment expert with over 30 years of experience in capital markets. He is also an adjunct professor at DePaul University.

Previous positions include full-time finance faculty and executive director of the Arditti Center for Risk Management at DePaul University, director of Coquest Institute at Coquest Advisors, head of risk at Octane Research, and chief operating officer of VK Capital, a wholly owned Morgan Stanley commodity trading advisor (CTA) business unit.

He conducts educational workshops, webinars, and is frequently invited to speak at industry and academic conferences. Mark has contributed research to several global organizations on volatility, macroeconomics, commodities, asset allocation, due diligence, and alternative investments.

Mark received his Doctorate in Business Administration (DBA) from DePaul University with his dissertation topic related to alternative investments. He received his MBA from the University of Chicago

Benjamin Sinclair

Investment Advisor and Associate Portfolio Manager
Designed Wealth Management



Benjamin Sinclair, CFA, CAIA is an Investment Advisor and Associate Portfolio Manager at Designed Securities. Previously he was a research analyst, having spent nine years covering equities in the financial services sector for a mid-sized wealth manager. Ben also runs a newsletter and podcast at www.BeyondTheExchange.ca, both focused on helping investors deepen their understanding of alternative investments.

SPEAKER BIOGRAPHIES

Ash Tahbazian

Head of Business Development, North America
3iQ Corp.



Ash Tahbazian is Head of Business Development for North America at 3iQ Digital Asset Management, where he leads regional growth, strategic partnerships, and institutional client expansion across the firm's regulated digital asset platform. He works with asset allocators, asset managers, insurers, and family offices to support disciplined adoption of digital asset strategies within established governance and capital allocation frameworks.

Ash brings more than two decades of experience in institutional markets, with a background spanning custody, capital markets, fund administration, and investment analytics. He previously held senior roles at State Street and CIBC Mellon, advising large asset owners and managers across the full investment lifecycle.

He is a graduate of the University of Toronto and holds both the CFA charter and CPA designation.

Mark Tower

Executive Director, Head of Business Development
Asset Management One USA



Mr. Tower is a senior institutional sales and marketing professional with over 25 years of experience in the alternative investment industry. Mr. Tower joined Asset Management One USA Inc. "AMO USA" in September of 2023 to lead the business development and investor relations functions. Prior to joining AMO USA, Mr. Tower was Director of North American Business Development at Lyxor Asset Management Inc. where he was focused on developing and maintaining client relationships across all verticals in the United States and Canada from December 2015 until September 2023. Since 2004 Mr. Tower has also built and grown institutional sales for UBP Asset Management, Rock Maple Funds, and Muirfield Capital Management. Mr. Tower began his career at Orbitex Group of Funds and REFCO Alternative Investments in sales and marketing roles.

Mr. Tower has a Bachelor of Arts from Boston College.

SPEAKER BIOGRAPHIES

Brian Wong

Executive Director, Investment Product Research
Morgan Stanley Wealth Management Canada Inc.



As part of the product team at Morgan Stanley Wealth Management Canada (MSWC), Brian is responsible for conducting initial and ongoing due diligence on various investment products including mutual funds, ETFs, SMAs and alternatives. He works closely with internal and external partners to build out the MSWC Alternative Investment product shelf and the Managed Account Program at MSWC. Prior to joining Morgan Stanley in 2022, Brian spent over seven years at BMO Nesbitt Burns as a Supervising Portfolio Manager, working closely with discretionary Portfolio Managers. Brian started his career in Singapore as a Futures/FX broker and spent over eight years managing Fund of Hedge Funds portfolios for multi-family office and HNW clients at various firms. Brian holds a Bachelor of Business degree from the Nanyang Technological University (Singapore) and is a Chartered Financial Analyst.

The image is a full-page document template. At the top, a dark teal header bar contains the word "NOTES" in a large, white, bold, sans-serif font. Below this header is a large white rectangular area filled with horizontal grey lines, intended for handwritten notes. At the bottom of the page, a dark teal footer bar contains two lines of white text. The left line reads "26 | WEALTH MANAGERS' FORUM 2026" and the right line reads "Read more at caasa.ca - or contact us at +1 (647) 953-0737 or paul@caasa.ca".

Flagship Conferences

FAMILY OFFICE SUMMIT

TORONTO
April 28-29, 2026

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



CAASA ANNUAL CONFERENCE

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.



Thematic Conferences

START-UP ROUND-UP

TORONTO
May 12, 2026

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



CAASA ALTERNATIVE PERSPECTIVES: PRIVATE MARKETS FOCUS

TORONTO
September 17, 2026

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



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