



PRESENTED BY: THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

# FAMILY OFFICE SUMMIT 2026

TUESDAY, APRIL 28 &  
WEDNESDAY, APRIL 29



Title Sponsor:





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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!

# Asset Management One USA Inc.



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Asset Management One USA Inc. “**AMO USA**” is proud to  
sponsor the **CAASA Family Office Summit 2026**

**April 28th and 29th** in Toronto

*Asset Management One USA Inc. is a New York-based investment advisor and a part of Asset Management One Co., Ltd. group, a global asset management company headquartered in Japan. Asset Management One USA Inc. is jointly owned by Mizuho Americas LLC (MALLC) and Dai-ichi Holdings, Inc.*

# MANY FORMS OF CONTENT

## A PLETHORA OF WAYS TO LEARN AND INTERACT

### TÊTE-À-TÊTE MEETINGS

*This is your opportunity to schedule one-on-one meetings with any conference delegate. All matching is best completed by end of day on April 27th to ensure the scheduling software has time to confirm the meetings and each one is served up to you at the right time.*

You can schedule as few or as many meetings as they might like. Over the years we received feedback that these are possibly the best part of our conferences as it gives folks an opportunity to connect away from the scheduled panels and meal times and really drill down into their respective interests. The software automatically suggests times that are mutually convenient for both parties.

*Anyone can book a meeting with any other delegate. Please decline meetings that you might not be interested in or able to commit too - then the other party can invite another to chat. And if you are interested, you're free to connect via our messenger or email (we do not release delegate emails or other contact information, so you'll have to ask for it or send yours along to them and await a response).*

**All meetings will be scheduled via our conference app and web portal. Meetings are best booked by noon on Monday, April 27th 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.**

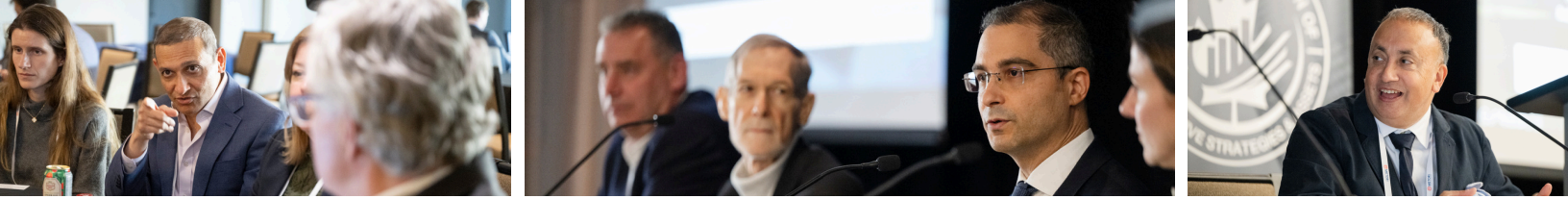
### TABLE TALKS

*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, April 27th 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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## WELCOME TO OUR IN-DEPTH LOOK INTO FAMILY OFFICE ISSUES

The CAASA Family Office Summit brings together speakers and participants from single and multi-family offices, investment dealers, Canadian and global investment management houses, and affiliated service providers. Panels and break-out sessions will focus on key issues facing family offices in Canada and elsewhere including structuring, legal & tax issues, IT and operational areas, and investments - including: hedge funds, CTAs, private equity, private lending, real estate, infrastructure, and crypto-assets/blockchain-related investments. All content is subject to Chatham House Rule.

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# FAMILY OFFICE SUMMIT 2026

## TUESDAY, APRIL 28th AGENDA

<p><b>2:00 PM</b></p>	<p><b>Single Family Office Roundtable (Relatives Only)</b>  Life as the principal of a family office can be exciting, inspirational, and busy, while at the same time worrisome, stressful, and draining. We provide this (strictly!) family members only session as an opportunity to meet with your peers and share questions, concerns, solutions, and insights across the table. We have nominated three leaders/instigators to get things going and guarantee that all will find the evening illuminating and fun.</p> <p><b>Octavian Graf Pilati</b>, The Antifragile Family, <b>Dominik v. Eynern</b>, Family Hippocampus, <b>Stephen Bloom</b>, Batl Capital LP <b>Ian Morley</b>, Wentworth Hall Consultancy Ltd, <b>Peter Fletcher</b>, Club b, <b>Robert Montgomery</b>, First Maximilian Associates Inc., <b>Russell Deakin</b>, Aceana Group</p>
<p><b>2:00 PM</b></p>	<p><b>Single Family Office Roundtable (Professionals Only)</b>  Working in a single family office is not your typical investment management job – you gain the benefit of a sometimes extremely flat organizational structure and many find the spectrum of duties and tasks to be (very) intellectually stimulating. On the other hand, it can be isolating and difficult to keep up with the pace of work: each family has its own dynamic and cadence so we created this session where (strictly!) full time employees (not relatives) of SFOs can interact with their peers to get the most out of their roles.</p> <p><b>Trevor Maunder</b>, Peerage Capital, <b>Andrew Garrett</b>, Ruck Lane Inc. <b>Scott Morrison</b>, Wealhouse, <b>Andrew Hamlin</b>, Federated Capital, <b>Drew Colaiezzi</b>, McPike Family Office</p>
<p><b>3:30 PM</b></p>	<p><b><u>Break Out Session 1</u></b>  <b>Option 1:</b> Rethinking Family Governance – an Iconoclastic Approach (Family Members Only)  <b>Option 2:</b> What Hasn't Worked: Mistakes and Missed Opportunities  <b>Option 3:</b> How Private Equity Is Evolving: Where Are Families Leaning Today?</p>
<p><b>4:15 PM</b></p>	<p><b><u>Break Out Session 2</u></b>  <b>Option 1:</b> AI in Practice: How Family Offices Are Actually Using It  <b>Option 2:</b> Co-Investing with Other Families  <b>Option 3:</b> Managing Liquidity &amp; Underperforming Managers</p>
<p><b>5:00 PM</b></p>	<p><b>Welcome Reception (All Delegates)</b></p>



# Pioneering scientific investment strategies

We are a global quantitative and systematic asset management firm based in Paris with staff in New York, London and Toronto. We apply a scientific approach to finance, developing alternative investment strategies and managing over \$23bn\* for our clients across the globe.

\*As of March 2026.

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*This document does not constitute advice, an offer or solicitation to invest in any program or product. Please note that an investment in alternative investments can involve significant risks and should be regarded as highly speculative in nature.*

# FAMILY OFFICE SUMMIT 2026

## SINGLE FAMILY OFFICE BREAK OUTS

*Single Family Offices Only*

<p>Break Out Session 1A</p> <p><b>3:30 PM</b></p>	<p><b>Rethinking Family Governance – an Iconoclastic Approach (Family Members Only)</b> Members of Family Hippocampus, a peer network of multigenerational business families studying family dynamics and governance, will lead this discussion on why alignment within the family system must precede formal governance structures. Drawing on their framework for building “antifragile” families, the session explores how communication, shared purpose, and family narrative strengthen long-term family resilience.</p> <p><b>Octavian Graf Pilati</b>, The Antifragile Family, <b>Dominik v. Eynern</b>, Family Hippocampus</p>
<p>Break Out Session 1B</p> <p><b>3:30 PM</b></p>	<p><b>What Hasn't Worked: Mistakes and Missed Opportunities</b> A candid, peer-driven discussion focused on investments, strategies, or structures that did not play out as expected. Participants will share lessons learned, how their frameworks have evolved, and how those experiences influence decision-making today.</p> <p><b>You-Ha Hyun</b>, Perpetual Investors GmbH, <b>Jay Rosenfeld</b>, Peerage Capital &amp; Artemis</p>
<p>Break Out Session 1C</p> <p><b>3:30 PM</b></p>	<p><b>How Private Equity Is Evolving: Where Are Families Leaning Today?</b> With the growth of secondaries, continuation vehicles, and more flexible private market structures, the traditional PE/VC model is being re-evaluated. This session will explore whether family offices are still allocating to blind pool funds in the same way, or shifting toward secondaries, co-investments, and other structures that offer greater visibility and liquidity. Participants will share how their approach to private equity is evolving, and where they are finding the most compelling opportunities today.</p> <p><b>Gabrielle (Ellie) Rubenstein</b>, Manna Tree, <b>Drew Colaiezzi</b>, McPike Global Family Office</p>

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# FAMILY OFFICE SUMMIT 2026

## SINGLE FAMILY OFFICE BREAK OUTS

### Single Family Offices Only

	<b>AI in Practice: How Family Offices Are Actually Using It</b> A candid discussion on how executives of family offices are incorporating AI into their day-to-day work. Participants will share real use cases, lessons learned, and emerging best practices, along with the challenges, risks, and organizational questions that come with adopting these tools.
<b>Break Out Session 2A</b>	
<b>4:15 PM</b>	
	<b>Jeff Szeto</b> , Avana Capital & Alder Capital Sustainable Ventures
	<b>Co-Investing with Other Families</b> Co-investing alongside other family offices presents both opportunity and complexity. This session will explore what drives successful partnerships, including alignment, governance, decision-making, and execution, along with where these relationships can break down. As part of the discussion, participants may also share select opportunities currently under review and explore potential co-investment alignment.
<b>Break Out Session 2B</b>	
<b>4:15 PM</b>	
	<b>Yahya Mahmoud</b> , BNQ Group, <b>Anmol Goel</b> , GACS Family Office
	<b>Managing Liquidity &amp; Underperforming Managers</b> As private market allocations increase, family offices are navigating both liquidity constraints and uneven manager performance. This session will explore how SFOs pace commitments, manage capital calls, and maintain sufficient reserves, while also addressing difficult decisions around underperforming managers. Participants will discuss how liquidity pressures influence manager evaluation, and how families approach holding, reducing, or exiting relationships during periods of stress or opportunity.
<b>Break Out Session 2C</b>	
<b>4:15 PM</b>	
	<b>Adrian Barber</b> , Barber & Associates, <b>TBA</b>

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647-258-7861

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587-350-1706

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● Shanghai, China

# FAMILY OFFICE SUMMIT 2026

## WEDNESDAY, APRIL 29TH AGENDA

<b>7:45 AM</b>	<b>Registration &amp; Breakfast</b>
<b>8:30 AM</b>	<p><b>The Future of Consumer Health and Wellness: Where Purpose Meets Private Equity Returns</b></p> <p>Shifting consumer preferences across nutrition, active lifestyle, and clean products are creating one of the most compelling and scalable investment opportunities in private markets while promoting better health and longevity. Drawing on real portfolio examples, Gabrielle Rubenstein of Manna Tree and François Ritchot of Sagana will explore how such private equity strategies can deliver attractive financial returns while advancing meaningful social outcomes.</p> <p><b>Gabrielle (Ellie) Rubenstein</b>, Manna Tree, <b>François Ritchot</b>, Sagana</p>
<b>9:00 AM</b>	<p><b>Applying AI in the Real World: From Family Office Operations to Systematic Investing</b></p> <p>This session brings together a leading Single Family Office and AQR Capital Management for a practitioner-level examination of how AI and Machine Learning are being applied today. The discussion will move beyond theory and investment “hype” to focus on real use cases, tangible benefits, and common pitfalls, from operational finance and decision-support within a family office to machine learning in systematic, research-driven investing.</p> <p><b>Bryan Kelly</b>, AQR Capital Management, <b>Jeff Szeto</b>, Avana Capital &amp; Alder Capital Sustainable Ventures</p>

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Mass Eye and Ear  
McLean Hospital  
Spaulding Rehabilitation



# FAMILY OFFICE SUMMIT 2026

## WEDNESDAY, APRIL 29TH AGENDA

<p><b>9:30 AM</b></p>	<p><b>The Professionalization of Family Office Private Markets Investing</b></p> <p>As family offices mature, many are transitioning from opportunistic, entrepreneur-led direct investing toward more structured, institutional-grade private markets programs. This session explores the structural and governance considerations required to build a scalable and sustainable private markets portfolio. Topics include diversification across vintages, strategies, and sectors, balancing direct investments with fund exposure, managing liquidity risk, and avoiding common portfolio construction pitfalls. Attendees will gain perspectives on how professional investors approach private markets and how family offices can adapt these principles and benefit from an allocation to private capital, through building portfolios designed to sustain and grow wealth across generations.</p> <p><b>Mathew Powley</b>, Stonehage Fleming</p>
<p><b>9:45 AM</b></p>	<p><b>Tough Questions on Evergreens</b></p> <p>Old school private equity, venture, and real estate LPs and GPs can remember when there was one way to gain access to these asset classes: closed-end funds with lives extending 10 years or longer without the possibility of liquidity except in the most extreme (and potentially capital-damaging) of instances. Today's investors are interested in something different: access to private markets on a continual basis with the benefit of contemporaneous pricing information (ostensibly for risk management regimes) and without the drawbacks of closed-end funds (ramp-up investment period, uncertain cashflows, and overall inefficient capital deployment). This panel will compare the two for LPs in the room.</p> <p><b>Drew Colaiezzi</b>, McPike Global Family Office, <b>Mike Woollatt</b>, Hamilton Lane <b>Colin Lynch</b>, TD Asset Management Inc., <b>Mathew Powley</b>, Stonehage Fleming</p>
<p><b>10:30 AM</b></p>	<p><b>Table Talks</b></p> <p>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</p>

# FAMILY OFFICE SUMMIT SPONSOR TABLE TALKS

10:30 AM - 11:15 AM

1. 

**Capital Direct I Income Trust**  
An Alternative Approach to  
Fixed Income



**Gord Ross**  
*Regional Vice  
President, Sales,  
Central Canada*

Capital Direct I Income Trust offers a 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.

2. 

**3iQ**  
Driving Institutional-Grade  
Returns Through Alternative  
Digital Assets, Why Now and  
What's Changed



**Rachel Kirkwood**  
*Investment Specialist*

3iQ looks forward to hosting a discussion on the evolving role of digital assets in institutional portfolios. We'll explore how these markets have matured, why now is the right time to consider them, and how digital assets can serve as a strategic alternative allocation that drives institutional-grade returns. The session will provide insights into portfolio construction, risk management, and real-world opportunities, offering a framework for investors looking to navigate the space.

3. 

**Capital Fund Management (CFM)**  
Escaping Flatland: Rethinking  
Diversification with  
Systematic Strategies



**Peter Vaiciunas**  
*Quantitative  
Portfolio Specialist*

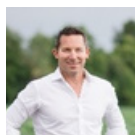


**Celine Yan**  
*Executive Director,  
Business  
Development*

In Edwin Abbott's Flatland, a two-dimensional world can't see what lies beyond its plane—much like portfolios that look diversified on paper yet remain dominated by equity risk after a 40-year bull market. This session examines why traditional diversification may be losing effectiveness, highlights the role of truly uncorrelated return streams, and offers a practical roadmap for adding a new "dimension" to portfolio construction through systematic strategies, including approaches that leverage AI and machine learning.

4. 

**Crescero Natural Capital Inc.**  
Insights and Opportunities in  
Farmland Investing



**Kent Willmore**  
*Founder & CEO*

Over \$500B of Canadian farmland is expected to undergo an intergenerational transfer. Let us provide further insight into this foundational asset class and discuss how Crescero can help you access this opportunity by partnering with investors and farm families to create value by actively optimizing, managing, and protecting Canadian farmland.

5.  iCapital

**iCapital Network**  
Facilitating Access to Leading  
Managers for Private Wealth  
Investors



**Tom Johnston**  
*Managing Director and  
Business Head for  
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.

6.  ipem

**IPEM**  
How do Canadian family  
offices gain access to private  
markets in Europe?



**Denise Ko Genovese**  
*LP Community  
Manager*

Amongst ongoing geopolitical uncertainty, how do Canadian family offices view Europe and are they still looking to Europe to help diversify their portfolios?

7.  LetkoBrosseau

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



**Yongai Xu**  
*Portfolio Manager,  
Partner*

A public market strategy producing mid teen returns since 2011 by focusing primarily on infrastructure, limiting downside to one small annual loss over that period. Absolute returns without the need for leverage or hedging. Hosted by Yongai Xu. Yongai is originally from Shanghai, with the firm since 2013.

8.  Mass General Brigham

**Mass General Brigham**  
Brain Care Score: Protecting  
and Improving Brain Health



**Jonathan Rosand**  
*Founder, Global Brain  
Care Coalition*

Dr. Jonathan Rosand is a world-renowned clinician, scientist, researcher, and pioneering brain health expert. He developed the Brain Care Score at Mass General's Brain Health Clinic – enabling people everywhere to benefit from scientific evidence to prevent brain disease and preserve brain function through daily behaviors. Attend to learn your score.

9.  Wilshire

**Wilshire**  
Unlocking the Power of Private  
Assets: Growth, Yield, and  
Inflation Protection



**Jessica Nicosia**  
*Managing Director,  
Alternatives*



**Vianney Gouny**  
*SVP, Client Solutions*

Private markets are becoming essential as companies stay private longer and traditional portfolios face new challenges. Join us to explore how private equity, credit, and real assets drive growth, yield, and diversification; and how Wilshire supports investors and advisors with research, manager selection, and portfolio solutions.

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across traditional and  
alternative asset classes

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# FAMILY OFFICE SUMMIT 2026

## WEDNESDAY, APRIL 29TH AGENDA

<p><b>11:15 AM</b></p>	<p><b>Legacy and Learning: Philanthropy Across Generations</b></p> <p>Families of means often develop an urge to give back to the society that enabled their success, while also instilling in their kin a sense of togetherness that helps them feel connected to one another and to the world at large. Whether through ad hoc giving initiatives, a shared family commitment, or a formal foundation, philanthropy can meet the giving goals of individual family members as well as the family as a whole.</p> <p>Of course, this can only occur with open communication. Our panel of family members and single family office professionals will speak to how their families approach philanthropy and deliver meaningful support to those in need.</p> <p><b>Greg Moore</b>, Richter Family Office, <b>Octavian Graf Pilati</b>, The Antifragile Family <b>River Ewing</b>, Hadley Family Office</p>
<p><b>11:45 AM</b></p>	<p><b>Looking Abroad: Where Family Offices Are Finding Opportunity Globally</b></p> <p>Family offices increasingly view the world as their investment universe. In this session, representatives from leading family offices will discuss how they identify and evaluate opportunities across regions and asset classes. The conversation will explore how families think about geographic diversification, access to local partners and networks, regulatory considerations, and managing risk across jurisdictions. Panelists will also share how their families' history, operating businesses, and global relationships influence where and how they invest. Attendees will gain practical insight into how family offices structure globally diversified portfolios while remaining agile in an evolving economic and geopolitical landscape.</p> <p><b>Kelly Burke</b>, Chamberlain Family Office Advisors, <b>You-Ha Hyun</b>, Perpetual Investors GmbH, <b>Edward Portet</b>, MAVRIK, <b>Anmol Goel</b>, GACS Family Office</p>

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# A leader in farmland asset management

Founded in 2012, Crescero Natural Capital is a Canadian farmland asset manager that creates value by actively optimizing, managing, and protecting Canadian farmland through its partnerships with both investors and farm families.

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Global population growth meets  
shrinking farmland supply

## 9.7 Billion

Expected global population by 2050.

## Significant Increase

In global food production is required.

## ~30 Million Acres

Of productive land are lost annually.

Untapped opportunity for investors to generate  
steady risk-adjusted returns

## Less than 2%

Of Canadian farmland is  
estimated to be owned by  
institutional investors.

## Over \$500B

Of Canadian farmland is  
expected to undergo an  
intergenerational transfer.

## Low Correlation

To traditional asset classes,  
exhibiting strong diversification  
characteristics.

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# FAMILY OFFICE SUMMIT 2026

## WEDNESDAY, APRIL 29TH AGENDA

12:30 PM	Lunch is Served
1:00 PM	<p><b>Lunch Keynote:</b>  <b>The Next Phase of Private Credit: Navigating Risk and Global Uncertainty</b></p> <p>Private credit has grown into a multi-trillion-dollar market as institutional investors step in to fill the lending gap left by banks. But as the asset class matures, rising defaults, tighter financial conditions, and geopolitical uncertainty are beginning to test the resilience of the market.</p> <p>In this keynote, Earl Hunt will share his perspective on the evolving private credit landscape. Drawing on Apollo's global platform, he will discuss where the most compelling opportunities exist today, how disciplined lenders are navigating risk, and why the next phase of the credit cycle may create both challenges and attractive entry points for long-term investors.</p> <p><b>Earl Hunt, Apollo, Nancy Bertrand</b></p>
1:30 PM	<p><b>Table Talks</b></p> <p>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</p>

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# FAMILY OFFICE SUMMIT

## SPONSOR TABLE TALKS

1:30 PM - 2:15 PM

1.



**Asset Management One USA**  
 Unlocking Systematic  
 Diversification



**Mark Tower**  
 Executive Director,  
 Head of Business  
 Development &  
 Investor Relations



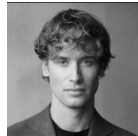
**Jiro Fujisawa**  
 Co-Head of Portfolio  
 Management

Join an interactive table discussion on how systematic, rules-based strategies may enhance portfolio diversification. We'll explore how disciplined, multi-asset approaches seek more consistent returns, reduce reliance on single betas, and complement traditional discretionary allocations for family offices.

2.



**Arthur Butler**  
 The Hidden Operational Risks  
 Family Offices Overlook  
 Outside the Portfolio



**William Gingras**  
 Founder and CEO

Family offices focus heavily on managing investments, but often overlook operational challenges tied to travel, coordination, and global movement. This session highlights how delays, poor planning, and fragmented support can impact time, decision-making, and opportunities and how leading families better organize these elements to operate more efficiently.

3.



**Ellipsis AM / Kepler**  
 Risk Mitigation Strategies :  
 turning volatility into  
 opportunity



**Sébastien Caron**  
 CEO, Ellipsis AM



**Christophe Vandewiele**  
 Investor Relationship  
 Manager for Canada,  
 Ellipsis AM

In 2026, volatility could be exacerbated by uncertainty surrounding monetary policy, ongoing geopolitical tensions, the accelerating pace of technological disruption, and tightening fiscal constraints—all factors that could trigger sharp swings in the equity markets. At Ellipsis AM, we view volatility as a genuine driver of performance. Discover how Alternative & Risk Mitigation Strategies can help you build sustainable performance for your portfolio.

4.



**Family Hippocampus**  
 Family Dynamics and Formal  
 Family Governance in  
 Dialogue



**Octavian Graf  
 Pilati**  
 Founding Member



**Dominik von  
 Eynern**  
 Founder

This roundtable explores the relationship between family dynamics and formal governance frameworks. Participants will discuss how governance structures, advisory ecosystems, and family relationships interact in practice, and how families and their advisors can create governance systems that evolve with the family over time.

5. **NEI**

**NEI**  
In a changing world, are you  
changing how you invest?



**Clara Bor**  
*Director, National  
Accounts and Strategic  
Relationships*

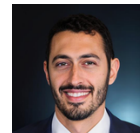
A discussion focused around how integrating ESG factors into the investment process influences a company's viability, profitability, and future relevance identifies enduring investment opportunities for the long term.

6. 

**ReSolve Asset Management**  
Portable Alpha for Private  
Wealth: Stacking Alternative  
Returns ON TOP of Traditional  
Portfolios



**Rodrigo Gordillo**  
*President & Portfolio  
Manager*



**Richard Laterman**  
*Head of Portfolio  
Solutions & Portfolio  
Manager*

For decades, institutions have used return stacking/portable alpha to outperform. Now that same playbook is available to everyone. Join us to explore how ReSolve can stack alternative returns on top of your existing portfolio, enhancing, diversifying and stacking it with a second growth engine, without sacrificing your high return targets.

7. 

**Richter Family Office**  
Family Office Trends



**Athas Kouvaras**  
*Partner and Portfolio  
Manager*

This roundtable discussion will encourage participants to discuss key trends in the family office industry from the perspectives of both allocators and investment management firms. A wide variety of topics will be discussed including the headlines around private credit, how geopolitical events like the war in Iran impact portfolio management, and what are the leading concerns and opportunities in this environment.

8. 

**TD Asset Management**  
Private Infrastructure



**Carl Elia**  
*Vice President &  
Director, Global  
Infrastructure  
Investments*



**Donato Scolamiero**  
*Vice President &  
Director, Relationship  
Management*

Private infrastructure offers access to essential assets powering everyday life - energy, transport, and digital networks. With long-term contracts backed by real assets - it can deliver resilient income, inflation linkage, diversification, and stability beyond traditional public markets.

9. 

**Torys LLP**  
When Family Disaster Strikes:  
Lessons from Common  
Mistakes



**Adrienne DiPaolo**  
*Partner*



**David Forrester**  
*Partner*

In this interactive session, Torys' Family Enterprises team will explore some of the most common issues enterprising families face across successive generations. We will share practical tips and insights to help mitigate these challenges, based on decades of experience acting for high-net-worth families and their businesses.

10. 

**Wealth Write.Up**  
Your Portfolio Went  
Alternative. Did Your Back  
Office?



**Brian McGlynn**  
*CEO*

With private markets now representing nearly half of family office portfolios, back-office accounting infrastructure hasn't kept pace. This session reframes data infrastructure as a principal-level decision, examines what AI-driven process enhancement can realistically handle today, and offers a practical readiness framework before your next technology investment.

# FAMILY OFFICE SUMMIT 2026

## WEDNESDAY, APRIL 29TH AGENDA

2:15 PM

### **Defining Success: The Many Dimensions of a Family Office Mandate**

For single family offices, success is rarely defined by financial returns alone. Each family brings its own priorities, whether generating income to support future generations, preserving and compounding wealth, or pursuing broader objectives such as philanthropy, impact, and legacy.

In this panel, family office principals will discuss how their families define and measure success across financial and non-financial dimensions. The conversation will explore balancing long-term wealth creation with lifestyle needs, aligning family members across generations, and using capital to create impact and reputation beyond the portfolio. Attendees will gain insight into the diverse ways families think about purpose, legacy, and what it truly means for a family office to succeed.

**Saad Hassan**, Hassan Family Office, **Catherine Shiang**, Asia Capital Advisor, Ltd, **Ian Morley**, Wentworth Hall Consultancy Ltd

2:45 PM

### **Inside the Family Portfolio**

Asset allocation sits at the heart of every investment program and is often cited as the primary driver of long-term returns. For family offices, however, portfolio construction often looks very different from traditional models, with meaningful allocations to private markets and other alternatives.

A family's portfolio frequently reflects its broader circumstances and philosophy: whether capital comes from an operating business, a preference for direct investments versus funds, tolerance for illiquidity, or a bias toward domestic versus global opportunities. In this session, our panelists will share how they think about asset allocation in practice and the role alternatives play within their portfolios.

**Alex Massi**, Wileys Bay Investments, **Andrew Hamlin**, Federated Capital, **Kevin Little**, KF Matheson Investment Holdings

# FAMILY OFFICE SUMMIT 2026

## WEDNESDAY, APRIL 29TH AGENDA

<b>3:15 PM</b>	<b>Tete-a-Tete / Afternoon Refresher</b>
<b>4:15 PM</b>	<p><b>Builder &amp; Steward: The Founder &amp; CEO Dynamic Inside a Modern Family Office</b> This keynote offers a rare, candid look at the relationship between a wealth creator and the professional entrusted to steward and scale that legacy. Featuring Miles Nadal alongside Trevor (President &amp; CEO, Peerage), the discussion will explore how founder vision and institutional discipline come together in practice. While Miles remains at the center of the story, the conversation is intentionally structured to reveal the operating dynamic between family and executive: how decisions are made, how roles are defined, where lines are drawn, and where they are deliberately blurred.</p> <p>Together, they will share how they have built trust, aligned on strategy, and evolved their partnership over time. The session will surface practical insights on governance, communication rhythms, capital allocation, and navigating moments of tension or transition. For family members and professionals alike, this is a behind-the-scenes view into what an effective founder &amp; CEO partnership looks like, and the lessons learned in building one that endures.</p> <p><b>Miles S. Nadal</b>, Peerage Capital, <b>Trevor Maunder</b>, Peerage Capital</p>
<b>4:45 PM</b>	<p><b>MFO Round-Up: Perspectives from Multi-Family Office Leaders</b> A popular panel each year, this session brings together leaders from leading multi-family offices to share their perspectives on the evolving landscape of serving ultra-high-net-worth families. Panelists will discuss how their firms are adapting their client service models, the changing needs of families, and the trends shaping wealth management, governance, and investment strategies. The discussion will also touch on how multi-family offices are navigating today's market environment and where they see opportunities and challenges ahead.</p> <p><b>James Burron</b>, CAASA, <b>Marjorie Skolnik</b>, CI Coriel Capital Inc., <b>Andrew Sarna</b>, Forthlane Partner, <b>Michael Keenan</b>, 1642 Capital</p>
<b>5:00 PM</b>	<b>Closing Reception</b>



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# KEYNOTE SPEAKERS

*Thank you to our many speakers, presenters, and those who added their themes and topics, panel and non-industry speaker ideas, and other invaluable input!*

# KEYNOTE SPEAKER BIOGRAPHIES

## **Earl Hunt**

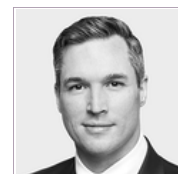
*Partner, Credit*  
Apollo



Earl Hunt is Partner, Credit at Apollo, where he serves as Chairman and CEO of Apollo Debt Solutions. Prior to joining in 2021, Earl was Partner in the Global Markets division at Goldman Sachs where he was responsible for strategic client coverage. He also served as a member of the Goldman Sachs's Partnership committee and Global Markets Operating Committee. Previously, Earl was Co-Head of US Distressed & Par Loan sales at Goldman Sachs. Before that, Earl worked at Citi as a director in Leveraged Financesales. Earl earned a BA in Economics from Brown University and is a member of the Brown University Board of Trustees.

## **Bryan Kelly**

*Principal*  
AQR Capital Management



Bryan Kelly is a Principal at AQR Capital Management, where he is the Head of Machine Learning, a portfolio manager and a senior member of the Integrated Research group. In his role, Bryan leads our efforts in developing and implementing Machine Learning methods and models in our portfolios. Bryan is also the Frederick Frank '54 and Mary C. Tanner Professor of Finance at the Yale School of Management and a Research Fellow at the National Bureau of Economic Research. Earlier in his career, Bryan was a tenured Professor of Finance at the University of Chicago Booth School of Business. Bryan's research has been published in the Journal of Finance, the American Economic Review, the Quarterly Journal of Economics, the Journal of Financial Economics, and the Review of Financial Studies, among others. He has won numerous awards for his work including the Harry M. Markowitz Award for best paper in the Journal of Investment Management in 2021, the Bernstein Fabozzi/Jacobs Levy award for best paper in the Journal of Portfolio Management in 2020, the Fama-DFA Prize for best paper in the Journal of Financial Economics in 2020 and 2017, and the DFA Distinguished Paper Prize in the Journal of Finance in 2023. Bryan earned an A.B. in economics from the University of Chicago, an M.A. in economics from the University of California, San Diego and a Ph.D. in finance from New York University.

# KEYNOTE SPEAKER BIOGRAPHIES

## **Miles S. Nadal**

*Founder & Executive Chairman*  
Peerage Capital



Miles S. Nadal is an internationally renowned industrialist, entrepreneur, investor, and philanthropist with more than four decades of experience building and scaling a diversified, multi-billion-dollar enterprise across North America. A proud Canadian Jewish gentleman, he is widely recognized for his disciplined leadership, strategic foresight, and enduring commitment to partnership-driven value creation.

Beginning his entrepreneurial journey in 1980 with a small Toronto office and a bold vision, Mr. Nadal built what has become a multi-billion-dollar business services and investment platform spanning real estate, asset management, self-storage, wealth platforms, and strategic operating companies. Through Peerage Capital and its affiliated entities, he pioneered a distinctive “perpetual partnership” model — aligning exceptional operators with long-term capital to preserve culture, continuity, and generational value creation.

Mr. Nadal’s leadership philosophy blends entrepreneurial boldness with institutional discipline. He has consistently demonstrated the ability to anticipate structural shifts, architect transformative partnerships, and scale platforms with integrity and precision. His reputation rests not only on financial performance, but on loyalty, long-term alignment, and trusted relationships built over decades. Beyond business, Mr. Nadal is a deeply engaged philanthropist whose contributions support medical research, education, Jewish institutions, and initiatives that advance opportunity and human dignity. His approach to both enterprise and philanthropy is guided by a core belief: success carries responsibility.

Through his enduring philosophy of “Dare to Dream,” Mr. Nadal continues to champion entrepreneurial courage, values-based leadership, and long-term stewardship on a global stage.



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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.

# 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

## **Adrian Barber**

*President*

Barber & Associates



Adrian Barber is the President of Barber & Associates(B&A), a single-family office based out of Mississauga, Ontario.

Overseeing a ‘wheel-spoke’ model, Adrian utilizes a range of partners to allow for both operational efficiency as well as best-of-breed execution. Investment management, operations, governance, succession and multi-generational planning fall within his purview. B&A’s portfolio is fully diversified and overweight private markets.

Adrian went to school somewhere and graduated with some degree. His poor headshot doesn’t speak to his competency, or maybe it does. Adrian loves his dog and has some kids and a wife but really loves his dog. Shout out to Quinn!

## **Nancy Bertrand**

*Former Managing Director Canada -Market Executive*

Citi Private Bank, Canada



Nancy Hoi Bertrand is the former Managing Director and Head of Citi Private Bank, Canada. In this role, she is responsible for the growth of the business in Canada, which serves and advises ultra-high net worth families, foundations and single-family offices on wealth preservation and creation, with a particular focus on alternative and international investments.

Citi Private Bank is dedicated to serving the world’s wealthiest individuals and their families. From 60 locations across 20 countries, the Private Bank offers services to more than 14,000 ultra-high net worth clients from nearly 100 nations. Its Canadian offices are in Toronto, Montreal and Vancouver. Having originally joined Citi Private Bank in 2006, Nancy has over 25 years of capital markets experience. Prior to Citi, she practiced U.S. securities law at the global law firm AOShearman, specializing in cross-border corporate finance and mergers and acquisitions.

Nancy sits on the board of the Golf Association of Ontario and is Past-President of the Toronto CFA Society and former Chair of its Governance and Nominations Committee. She was a member of the CFA Institute’s Capital Markets Policy Committee and a member of CFA Institute’s Global Corporate Governance Task Force and received her Chartered Financial Analyst designation in 2002.

Nancy is a graduate in Business Administration (Dean’s List) from the Richard Ivey School of Business at Western University and a Bachelor of Laws (great distinction) from McGill University. She has been called to the bars of the State of New York, the Commonwealth of Massachusetts and the Province of Ontario. She previously sat on the cabinet of the Royal Ontario Museum’s Young Patrons’ Circle, speaks Mandarin, Cantonese and French, is married and mentoring an adult daughter.

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# SPEAKER BIOGRAPHIES

## **Stephen Bloom**

*Founder*

Batl Capital LP



A former senior partner of Goodmans LLP, one of Canada’s leading full service law firms who practiced corporate law for almost 30 years. Past CEO of Shiplake Properties Ltd., a third-generation family-owned private business. Co-founded Collecdev, Shiplake’s development and construction management business. Currently, President and Managing Partner of Batl Capital, founded by Stephen as a family office and manager of capital.

In his previous role as CEO of Shiplake, Stephen provided critical support and guidance to the day-to-day management of a billion-dollar business that included the ownership and operation of an apartment portfolio and retirement residence, high-rise development and construction management, as well as investment in commercial real estate, private equity and public securities.

Stephen is a value-added investor who has negotiated and completed dozens of transactions, including land and business acquisitions, dispositions, financings, joint ventures, partnerships and shareholder agreements, while providing wise counsel throughout the life cycle of the investment.

Stephen has served on the boards of various charitable organizations including the Israel Cancer Research Fund, Tanenbaum CHAT and Trustees of the Jewish Foundation of Toronto.

## **Kelly Burke**

*Co-Founder & Partner*

Chamberlain Family Office Advisors

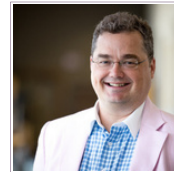


Kelly J. Burke is a Toronto-based consultant and relationship-builder known for strengthening the connective tissue of Canada’s family office and private-capital ecosystem. As a senior leader at Chamberlain Family Office Advisors, Kelly works closely with multi-generational families, founders, and wealth stewards to align strategy, governance, and long-term vision. His career spans commercial banking, private equity, and strategic planning—anchored by a disciplined approach to trust, discretion, and operational excellence.

# 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).

## **Drew Colaiezzi**

*Private Investments*  
McPike Global Family Office



Drew Colaiezzi is a private equity/venture capital specialist & investment manager with a background in capital markets focused on securitizations, specialty credit products, fixed income asset-back warehouses, financing consultancy, investment strategies & management, investment relationship structures, and early-stage venture.

After working in NYC and Miami for various private equity firms, he moved internationally and currently sits on the investment committee for MGFO, a single-family office based out of the Bahamas with a large venture portfolio containing exposure to various industries with a strong focus on early stage opportunities in financials, tech, fintech, life sciences, the carbon economy, venture funds, co investment opportunities, and web3/crypto based assets.

# SPEAKER BIOGRAPHIES

## **Russell Deakin**

*CIO and Managing Partner*  
Aceana Group



Russell Deakin serves as the Chief Investment Officer (CIO) and Managing Partner at Aceana Group, bringing over 25 years of experience in alternative assets, including private equity, venture capital, real estate, infrastructure, and renewable energy. His career spans North America, Europe, South America, India, and China, underscoring his extensive global expertise.

His specialties encompass entrepreneurial ventures, blockchain, crypto, growth capital, private equity, real estate development, infrastructure, renewable energy, and international capital markets.

Russell holds an MBA from the Anderson Graduate School of Management at UCLA, with undergraduate studies completed at Oxford University (Honors Exchange Program in PPE) and Tufts University (BA in Economics and History).

## **Dominik v. Eynern**

*Founding Member*  
Family Hippocampus



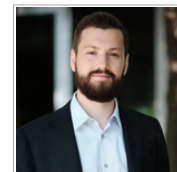
Dominik v. Eynern is a 4G family member from a business family which is now in its 5th generation.

He holds a BSc in Economics and a MSc in Finance. He worked in the international investment banking industry and he's a founding member plus a director of Family Hippocampus ltd. and an investor / NED of DECOMPLEX AG, a software that helps families to navigate their behaviours towards a sustainable legacy.

His research on family dynamics is inspired by insights from behavioural economics, cognitive neuroscience, dynamic complex system, chaos and quantum theory.

## **River Ewing**

*Director*  
Hadley Family Office



River is a Director at Hadley Family Office, where he partners with entrepreneurs to acquire and build enduringly profitable small businesses as a leading investor in entrepreneurship through acquisition. In 2019, River founded the Hadley Family Foundation, a registered Canadian charity and private foundation focused on high-impact philanthropy in food systems.

River earned a BA in Philosophy from the University of Western Ontario and an HBA from the Ivey Business School. He also holds an MBA from Harvard Business School.



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# SPEAKER BIOGRAPHIES

## **Peter Fletcher**

*Managing Director*  
PHF Capital Inc.



Peter Fletcher is the Managing Director of PHF Capital Inc., where he manages his own family investment office and advises a select group of substantial global family offices on international investments, asset allocation, and other pertinent family office matters.

Peter has garnered over fifty years of successful international experience that covers a broad spectrum of financial management functions in the trust and banking industry in Canada, Australia, Bermuda, Hong Kong and Switzerland.

In addition to holding several directorships of investment funds and companies, Peter has served on various international governments' financial regulatory bodies and holds the professional designation of Chartered Financial Analyst.

Peter is also the Founder and Chairman of Club b – a globally-renowned, members-only, private and non-commercial international investment forum for family offices.

For more than thirty years, Club b has provided authoritative insight on global market trends and asset allocation, as well as providing an innovative forum for global family offices to exchange investment ideas through annual events and other collaborative platforms. The Club b encourages family offices to enlarge their personal network in an informal and collegial setting, expand their knowledge through renowned speakers and navigate their greatest challenge – the transition from one generation to the next.

Peter is also the Founder and Chairman of Club f – an invitation-only, global platform dedicated to elevating family philanthropy, fostering the transition of the next generation into effective business and philanthropic leadership while addressing sustainability and climate change challenges.

Additionally, Peter is the Managing Director of Consilience Collaboration Inc. (CCI) – an exclusive, extensive world-class network of investment strategists and asset allocation experts with a proprietary curated research platform.

## **Andrew Garrett**

*Chief Investment Officer*  
Ruck Lane Inc.



Andrew Garrett is Chief Investment Officer at Ruck Lane, where he is an investor and operator working within pension and private family office–sponsored platforms focused on scalable real asset strategies across Canada.

Andrew brings a private alternatives market perspective shaped by experience as both an institutional allocator and operator. During his time with Investment Management Corporation of Ontario, he helped expand and diversify a multi-billion-dollar real estate portfolio, including significant growth in residential and commercial rental strategies. Earlier in his career, he gained large-scale development and operating experience with platforms such as Cadillac Fairview.

Today, Andrew works directly with pension and private wealth capital to help partners scale their exposure to reliable real asset income without the volatility of listed markets.

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# SPEAKER BIOGRAPHIES

## **Anmol Goel**

*CEO & Investor*

GACS Family Office



Anmol is serial Entrepreneur, LP, Family Office Operator and a Venture Capital expert, with a degree in Mathematics & Economics and a Certification in Innovation from Harvard Business School. He has Invested and scale over 80 startups and 5 funds across the world and with his background being in the world of investment banking & wealth management within the likes of JP Morgan, and Marsh McLennan he is tremendously capable of investing and growing small to big scale projects.

He exited his first company at age 20 and went on to beta test models at Open ai and Gemini before public release and now Anmol's current startups are doing over \$100M Annual recurring revenue and he has facilitated over 9 figures for his startups currently and is building out an over \$100M fund out his own pocket backing Indian diaspora founders.

### Achievements:

- Operates Family Office with over \$1.2Bn in AUM and advising on further \$70Bn in assets
- Forbes 30u30 Nominated, in Magazines like Bloomberg, Financial times, UAE times, World Economic Forum etc.
- The NY Weekly 40 Under 40 2025 (Youngest In the cohort)
- Awarded with GRA global recognition award 2024, UK Regional award for Best Newcomer Investment consultancy of the Year 2024 & Nominated for British awards CEO of the year & Male entrepreneur of the year, Investment Consultancy of the year 2025, India society Investor of the Year 2025, Innovation Investor of the year 2026 and more.

## **Andrew Hamlin**

*Vice President and Portfolio Manager*

Federated Capital



Andrew leads the investment team at Federated Capital, a private single family office. He is responsible for overseeing the whole investment process from identifying, investing, and monitoring investments. He has extensive experience allocating capital in both public and private markets. Andrew has a strong track record of performance having worked in the industry for over 25 years. Previous experience includes spending 10 years building an independent asset manager, working with high net worth families, and sitting on the board of a private air logistic company. He started his career in the capital markets division of Canada's largest banks. Andrew has an MBA from the Schulich School of Business and a Master degree in International Politics from Sussex University (UK).

# SPEAKER BIOGRAPHIES

## **Saad Hassan**

*Principal and North American Head*  
Hassan Family Office



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

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

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

## **You-Ha Hyun**

*Principal*  
Perpetual Investors GmbH



You-Ha Hyun leads the private debt program at Perpetual Investors GmbH, a German based family office. In this role, he is responsible for managing the private debt portfolio and focuses on manager selection, co- and secondary investments across the broad spectrum of the private debt universe as well as structured capital GP funding solutions. You-Ha has more than 20 year experience in the alternative investment segment having done primary, secondary and co-investments at large institutional organizations such as an insurance company, a supra-national organization and a fund-of-funds. You-Ha began his career in the M&A advisory business at KPMG and is an economist by training.

# SPEAKER BIOGRAPHIES

## **Michael Keenan**

*Chief Investment Officer*

1642 Capital

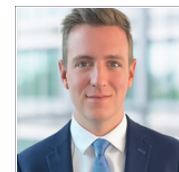


Michael is a seasoned investment professional with over twenty-five years of institutional funds management experience. Prior to joining 1642 Capital, Michael spent over twenty years with Bimcor Inc, which is the pension investment subsidiary for the Bell Canada group of companies, including seven years as Chief Investment Officer. He is a past Chair of the Pension Investment Association of Canada and sits as an independent advisor on several investment committees for pension and trust organizations. Michael is a CFA charter holder with a B. Arts & Science (Economics) from McMaster University and an M.A. (Economics) from Western University. Michael believes that independence, discipline, and humility are key ingredients for long-term investment success.

## **Kevin Little**

*Portfolio Manager*

KF Matheson Investment Holdings



Kevin is a Portfolio Manager at KF Matheson Investment Holdings, a Toronto-based single family office, where he leads manager and co-investment selection and helps oversee a multi-asset portfolio spanning private alternatives and public markets. His responsibilities include sourcing and evaluating investments, managing RFP and co-investment processes, monitoring current allocations, and advising the Investment Committee on asset allocation and long-term portfolio construction.

Previously, Kevin spent a decade at Eckler Ltd., where he was a Principal and Investment Consultant advising pension plans, foundations, and endowments with more than \$3.5 billion in combined assets. He led the firm's private equity and private debt research and supported clients across asset allocation, implementation, monitoring, and investment governance.

Kevin holds a Bachelor of Commerce from Dalhousie University and the CFA and CAIA designations. He also serves on the Board and Investment Committee for Canada's National Ballet School Foundation and is a member of the St. Michael's Young Leaders Committee, organizing fundraising efforts for the St. Michael's Hospital Foundation.



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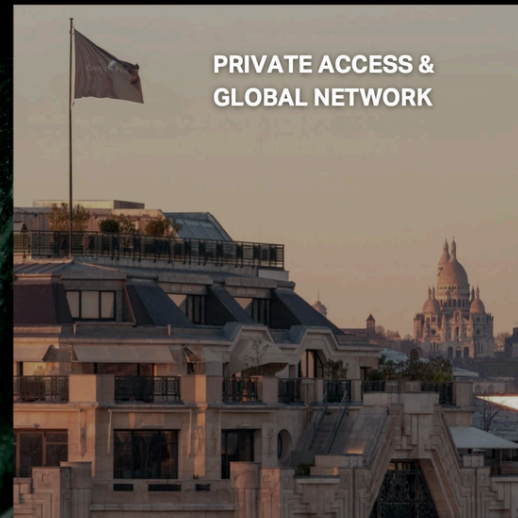


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# SPEAKER BIOGRAPHIES

## **Colin Lynch**

*Managing Director, Head of Alternative Investments*  
TD Asset Management Inc.



Colin is Managing Director and Head of Alternative Investments, providing strategic guidance and oversight to a \$39 billion portfolio of real estate, mortgage, private debt and infrastructure investments. In this role he oversees all acquisitions, divestitures, product development and portfolio management activities. Colin serves as Chair of the Alternative Investments Committee. He was previously responsible for the Canadian and International Real Estate strategies including fund design and structuring, implementation and oversight of acquired assets.

Colin joined TD Asset Management in October 2015, initially working with TD Asset Management's senior executive team on corporate strategy. Colin was formerly the General Manager of Global Strategy at Aimia (formerly Groupe Aeroplan), a Management Consultant at McKinsey & Company and an Investment Banker at Morgan Stanley. Colin's work in the Investment Banking Division at Morgan Stanley involved, among other duties, advising Mark Carney (then Governor of the Bank of Canada) on Canada's financial stability during the financial crisis.

Colin holds a B.A. and a B. Comm., both with Distinction from Queen's University, an MBA with Distinction from Harvard University and an ARCT with Honours from the Royal Conservatory of Music. In 2020, Colin was named one of Canada's Top 40 under 40 a Trustee Emeritus of Queen's University and a Recipient of the Queen's University Toronto Branch Award.

He is the Chair of the Toronto Investment Board and a Member of the Board of Directors of Sunnybrook Health Sciences Centre, the Black Opportunity Fund and the Advisory Committee of OneEleven. Colin is an Emeritus Trustee of Queen's University. He was formerly Vice Chair of the Board of Directors of Toronto Community Housing Corporation.

## **Yahya Mahmoud**

*President*  
BNQ Group



Yahya Mahmoud is a seasoned real estate investor with over 25 years of investment experience. Yahya's Single Family Office focuses on strategic and value-add real estate investments, actively engaging in equity and debt placements. Yahya founded and exited his business from 2017 to 2023, after a two decade corporate career with Fortune 500 firms and is a proud family man with two young adults. We primarily look for co-investment / co-lending opportunities.

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GP Firms

# SPEAKER BIOGRAPHIES

## **Alex Massi**

*Chief Investment Officer*  
Wileys Bay Investments



Alex leads Wileys Bay's investment activities and helps shape the firm's overall strategy. He brings over a decade of experience in alternative investments, strategic asset allocation, manager selection, and co-investments. Before joining Wileys Bay, Alex was responsible for partnership investments at Woodbridge Investments, one of the world's largest family offices, overseeing the strategic implementation of its external manager and co-investment programs. He began his career in investment banking at Scotiabank. Alex holds an Honours Bachelor of Commerce from the University of Ottawa and a graduate degree in Applied Finance from McGill University. He is a CFA Charterholder.

## **Trevor Maunder**

*President & Chief Executive Officer*  
Peerage Capital



Trevor is President and Chief Executive Officer at Peerage Capital. With a Commerce degree from Queen's University, Trevor began his professional career at PriceWaterhouseCoopers as a CPA. There, he focused on transaction support for the telecom and media sectors before moving to MDC Partners Inc. At MDC, Trevor worked in the corporate development group where he led two restructurings, acted as a partner company CFO, oversaw the successful bidding and implementation of the Multi-Print III stamp contract awarded by the United States Postal Service, and assisted with acquisitions and due diligence. As CEO, Trevor oversees development and execution of the broad corporate strategy for Peerage, including the ongoing growth of all operating platforms including real estate services, asset management and self-storage.

## **Robert Montgomery**

*Chief Executive Officer*  
First Maximilian Associates Inc.



Robert Montgomery is an investor and entrepreneur focused on the digital media, entertainment, gaming and technology industries. For many years, Mr. Montgomery has been an executive and advisor for media, communications and technology companies and the investment community. He currently serves as the CEO of First Maximilian Associates Inc., his own family investment and advisory firm. He also serves as Chairman of GameCo Inc., an innovative company serving and gaming industry. Mr. Montgomery was previously owner and CEO of Achilles Media, an events and transaction facilitation company focused on the entertainment, technology and investment industries.

Mr. Montgomery's prior positions include: Co-Founder and Partner in Achilles Partners, an investment and advisory firm; President, Americas at the Fantastic Corporation, a broadband software company; Co-Founder and Chairman of Media Content plc in London, a media rights company; Managing Director for Europe and Asia Pacific at communications research and consulting firm Kagan World Media; co-founder of Digital Media International; Managing Director at Euromoney plc, and Managing Director at IBC plc. Mr. Montgomery has served as a Director of several public and private companies and is an active investor in emerging companies. Mr. Montgomery is a graduate of the University of Manitoba, Canada. Active in the community, Mr. Montgomery is Past Chair of the Board of Governors of the OCAD University.

# SPEAKER BIOGRAPHIES

## **Greg Moore**

*Partner, Portfolio Manager*  
Richter Family Office



Accomplished, driven, yet known for his kindness, Greg has big ideas that match the scope of his ambition. A great people connector he loves to build durable, effective business relationships. His enthusiastic nature means that he is ready to jump whole-heartedly into every project he takes on. Greg is a seasoned wealth management professional with almost 30 years' experience in global financial markets, working with individuals, institutions, and family offices. Greg brings a unique, holistic approach to wealth management and works with professionals in a segment of the market that sees value in working alongside an independent, trusted advisor as part of their overarching wealth management solution.

As a Family Enterprise Advisor (FEA), Greg works with families to help them navigate the complexities of wealth and legacy transmission. Bringing together both a technical skill set, as well as a deep understanding of relational family and enterprise strategy issues, he strives to help families address complex problems through open communication and trust.

In addition to his business development and relationship management roles, Greg is actively involved in ongoing investment manager due diligence and manager selection to ensure that RFO clients continue to receive access to unique, best in class investment solutions. Bringing a thoughtful approach to asset allocation and portfolio construction, Greg works closely with families to help them bridge the gap between a complex investment landscape and their own unique investment goals.

## **Scott Morrison**

*Chief Investment Officer*  
Wealhouse Capital Management



Scott Morrison is the Chief Investment Officer of Wealhouse Capital Management, a privately-owned investment firm and family office. As the firm's founder, Scott is responsible for overseeing Wealhouse's various strategies across asset classes, as well as the firm's private equity portfolio and real estate holdings.

Outside of Wealhouse, Scott serves on the investment committee of the Centre for International Governance Innovation (CIGI), where he advises on investment decisions for CIGI's endowment fund. Scott has over 25 years of asset management experience. Prior to Wealhouse, Scott spearheaded the portfolio management for notable firms such as Mackenzie Investments, CI Funds, and Investors Group. Scott holds a Bachelor of Finance from Concordia University and is a CFA Charterholder.

# SPEAKER BIOGRAPHIES

## **Ian Morley**

*Chairman*

Wentworth Hall Consultancy Ltd



Ian Morley is a successful business Angel and Entrepreneur.

He is the Chairman of Wentworth Hall Family Office and Consultancy, Chairman of Atitlan YRD, an award winning Crypto Multi Manager. Chairman of Salutem Senior Living, Chairman of Regenerative Medical Group, NED at Conister Bank, NED at CF@L, Director of Condor Trade and also holds various Directorships with a range of other companies covering Property, Alternative Energy, Farmland, Blockchain and Crypto currencies.

He is the author of Morley's Laws of Business and Fund Management and one of the leading global figures and pioneers in the development of the Hedge Fund Industry. He ran one of Europe's first and oldest Fund of Funds and subsequently helped build one of Europe's largest privately-owned Fund of Funds. He has helped build, manage, own, buy, sell and mentor start-up businesses over the last twenty years. He founded and was elected the first Chairman of what is today known as The Alternative Investment Management Association (AIMA), the world's only truly global trade association for the Hedge Fund Industry. He has advised Central Banks, International Regulators and other International Organisations such as the EU and OECD on matters related to Economics, Markets and Regulation. He is actively involved in Family Office conferences and networks.

His articles have been published in such papers as The London Times, FT, International Herald Tribune and various trade publications. He has appeared frequently on BBC, radio and TV, Sky, CNN, CNBC, Bloomberg and various international TV and radio stations.

Ian trained as an Economist at LSE where he was Vice President of the Students Union. He is a member of Gray's Inn and one of the few fund managers to be accredited as a journalist.

Ian served as a battle medic with a MASH unit and has completed sixteen International Marathons, one hundred and fifty Half Marathons and competed in weight lifting and dancing competitions. He was the London Theater Correspondent for the Irish Stage and Screen. He has also written about Running and Building a house in Italy for Italy Magazine. His other interests include boating, football, politics and philanthropy. He lives in London with his dog, cat and sometimes his children.

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# SPEAKER BIOGRAPHIES

## **Octavian Graf Pilati**

*Founder*

The Antifragile Family



Octavian Pilati is your trusted guide for navigating the unique and often intricate dynamics of business families.

Born and raised in Austria within an aristocratic family whose legacy spans over a thousand years, Octavian developed a deep understanding of the challenges business families face, experiencing their complexities firsthand.

In 2014, a major fraud crisis struck his family's historic tourism and forestry business, pulling him directly into crisis management. That moment didn't just change his trajectory – it gave him lasting insights into resilience, adaptability, and the realities of sustaining a legacy.

Today, Octavian applies those lessons with sincere commitment, helping business families strengthen their bonds and secure their long-term success. He is a sought-after speaker at leading family business events hosted by organizations such as Prestel & Partner, Campden Wealth, and Forbes Slovakia. His family's story is also featured in a case study co-published with Harvard Business School, where he contributes as a co-presenter in executive education programs.

As the founder of The Antifragile Family®, Octavian helps business families unlock resilience, trust, and lasting unity. His mission is clear: to transform business families into antifragile units that grow stronger through life's inevitable challenges.

## **Edward Portet**

*Vice President, Finance*

MAVRIK



Edward joined MAVRIK in 2023 as the Vice President of Finance, overseeing financial matters across all activities of the family office and responsible for adapting key processes.

In his previous role, Edward was the CFO for the Paris-based independent multi-asset investment company Weinberg Capital Partners. Edward was responsible for finance, operations, digitalisation and compliance.

Edward began his career in finance, holding roles within global public corporations. Initially, he worked for Valeo, an automotive supplier at a production site in Mexico, followed by a position at the headquarters of L'Oréal Groupe, a global leader in cosmetics. He then moved on to Groupe Casino, a global retailer, where he was involved in a Post-Merger Integration context. In 2013, Edward joined the private equity group Eurazeo. Over time, he advanced to become the Finance Performance Director, working for both the holding and its portfolio companies across France, Europe, and the USA.

Edward holds a Master's Degree in Management from the ESSEC Programme Grande Ecole in Paris, France, and has served as a lecturer there for over five years.

# SPEAKER BIOGRAPHIES

## **Mathew Powley**

*Partner*

Stonehage Fleming



Mat is a Partner at Stonehage Fleming heading up the Private Capital business and is responsible for implementing the firm's private capital strategy and overseeing all aspects of the Private Capital Fund platform which has AUM in excess of \$1bn. Mat co-founded the Stonehage Fleming Annual Vintage Programme in 2016, the firm's flagship private capital fund of funds. He joined the Group in 2009 having previously worked for BNP Paribas in London and State Street in Toronto. Mat completed a BA degree in International Business and Economics at Western University. He holds both the CFA and CAIA designations

## **François Ritchot**

*Investment Director*

Sagana



François is an impact investing transaction and strategy professional. He is an Investment Director at Sagana, advising UNWHI and family offices investing in companies and funds with attractive financial returns and significant human and planetary impact. At Sagana, Francois leads investment activities in the Food and Agriculture sector globally. He was previously an Associate Director at Palladium Impact Capital (formerly Enclude) where he provided capital raising services to impact enterprises (pre-revenue to growth-stage) and mission-driven financial institutions as well as impact fund placement.

## **Jay Rosenfeld**

*Director of Business Development*

Peerage Capital & Artemis



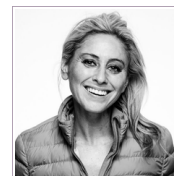
Jay is Peerage Capital & Artemis' Director of Business Development. Jay brings more than 30 years of experience in the Financial, Advertising and Marketing industries. Responsible for building business for the groups, Jay has exposure to all asset classes and a deep understanding of Asset Allocation & Asset management.

Prior to Artemis, he worked as Regional Director for Smart Circle International overseeing operations in the North Eastern United States. He hired, trained, and managed over 200 sales representatives. Jay earned a Bachelor of Arts and an Economics degree from Bishop's University.

# SPEAKER BIOGRAPHIES

## **Gabrielle (Ellie) Rubenstein**

*Co-Founder and Managing Partner*  
Manna Tree



As the Co-Founder and Managing Partner of Manna Tree, Gabrielle (Ellie) Rubenstein is a passionate investor focused on improving human health. Ellie is a member of the firm's Executive and Investment Committees. She shapes the firm's vision strategy and investment products and develops Manna Tree's global network. For the past 10 years, Ellie has studied the evolution of the food and beverage supply chain, as well as the increasing consumer demand for healthier alternatives.

Prior to founding Manna Tree, Ellie helped develop the impact investing thesis for a family investment office well known for ESG driven strategies. As part of new product development for the office, she helped launch the first ever arctic asset manager based in Alaska. This established her early belief in the power of impact investing to address social challenges without sacrificing returns, as well as the importance of energy and food as asset classes.

In 2022, Ellie was appointed to the Alaska Permanent Fund Board of Trustees, where she played a pivotal role over two years, including chairing the Governance Committee and being elected Vice Chair. Her leadership contributed to significant reforms, such as re-establishing incentive compensation for APFC staff, expanding asset allocation, and approving a \$100 billion strategic plan.

Beyond her professional endeavors, Ellie is a committed philanthropist through her family office, Mission: Ingredients. She supports organizations that drive positive change in global population health,

## **Andrew Sarna**

*Portfolio Manager*  
Forthlane Partner



Andrew Sarna is a Portfolio Manager at Forthlane Partners and the author of Off the Charts, Forthlane's widely read macro and markets newsletter. Based in the Cayman Islands, Andrew leads Forthlane's global public-markets research with a focus on macro strategy, cross-asset positioning, and long-term portfolio construction. His work combines institutional-grade analysis with clear and accessible commentary that makes complex market dynamics intuitive for private investors and family offices.

At Forthlane, Andrew plays a central role in developing the firm's all-weather investment framework. He draws on global macro data, factor research, and thematic insights. He collaborates closely with Forthlane's investment leadership on portfolio construction decisions across equities, fixed income, alternatives, and real assets.

Andrew holds an HBA from the Ivey Business School and a Bachelor of Engineering Science with a specialization in Integrated Engineering from Western University. He graduated from both programs with Honours. Andrew is a CFA Charterholder.

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# SPEAKER BIOGRAPHIES

## **Catherine Shiang**

*Managing Director*  
Asia Capital Advisor, Ltd

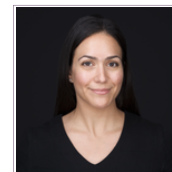


Catherine serves as Managing Director at a single family office, for the past 19 years. In this capacity she has managed the family's portfolio construction with focus on alternative assets and direct opportunities. Prior to joining the family office Catherine began her career at a global US law firm based in New York. She subsequently served as general counsel to several public and privately held companies and tech start ups in the US and Asia. She founded a US risk management tech company. Catherine also angel invests globally with focus on agriculture, bio tech and suborbital space sectors.

Catherine holds a Bachelor of Arts from the University of California, Berkeley, in political science with minor in biochemistry, and Juris Doctor from Georgetown University Law Center with election to The Tax Lawyer as Associate Editor. Catherine is admitted to the New York State Supreme Court's Appellate Division, First Department, and U.S. Federal District Court for the Southern District of New York and the State Bar of California.

## **Marjorie Skolnik**

*Managing Director*  
CI Coriel Capital Inc.



Marjorie Skolnik is a Managing Director at CI Coriel Capital Inc., an Outsourced Chief Investment Officer supporting ultra high-net-worth Canadian families and foundations with their investment programs since 2006.

She previously held various positions in the institutional capital markets, including as Director, Global Equity Derivatives at National Bank of Canada. She began her career at Scotiabank, where she transacted interest rate derivatives with central banks, treasuries and hedge funds.

Marjorie is involved in several philanthropic projects. She currently serves as:

- Member of the Investment Committee of the Fondation Lucie et André Chagnon, and
- Member of the Board of Directors of the Jewish Community Foundation of Montreal.

She holds a Bachelor of Commerce degree, with a Major in Finance, from the John Molson School of Business at Concordia University, and is a CFA charter holder.

## **Jeff Szeto**

*CFO & Lead Investor*  
Avana Capital & Alder Capital Sustainable Ventures



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



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# SPEAKER BIOGRAPHIES

## **Mike Woollatt**

*Head of Americas, Client Solutions*  
Hamilton Lane



Mike is a Managing Director based in Toronto responsible for, leading the U.S. Institutional, LatAm and Canadian Client Solutions teams, as well as the Global Consultant Relations team. Mike was previously Head of Canada and has also worked on the Fund Investment & Managed Solutions and Direct Equity teams.

Prior to joining Hamilton Lane in 2019, Mike was a Director at OMERS pension plan in the venture capital and growth equity groups. Prior to OMERS, Mike was the CEO of the Canadian Venture Capital and Private Equity Association. He has also co-founded a management consulting firm and has held senior executive roles at a few major Canadian corporations.

Prior to entering the private sector, Mike worked for the Government of Canada, first as a research economist and then as a political and policy advisor to the Minister of Finance. Mike has also worked overseas as an economist on World Bank funded international development projects and taught economics at the university level. Mike is a frequent commentator on both broadcast and print media on the state of the Canadian private capital markets.

Mike holds a Master of Economics from the University of British Columbia.



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