



FAMILY OFFICE SUMMIT 2026

📶 Name : AGF_CapitalPartners | Password: Tactical_Alpha

KEYNOTE

**THE NEXT PHASE OF PRIVATE CREDIT:
NAVIGATING RISK AND GLOBAL UNCERTAINTY**

📅 APRIL 29, 2026 ⌚ 1:00 PM - 1:30 PM



Nancy Bertand

*Former Managing Director
Canada -Market Executive
Citi Private Bank, Canada*



Earl Hunt

*Partner, Credit
Apollo Global Management*



Post Conference Report

FAMILY OFFICE SUMMIT 2026

April 28 – 29, 2026 • Toronto Board of Trade

Family Office Summit 2026 | Read more at caasa.ca - or contact us at +1 (647) 953-0737 or paul@caasa.ca



CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

Overview

CAASA's Family Office Summit 2026 was built as a curated family office gathering, not a high-volume industry conference. Held April 28–29 in Toronto with an intentional cap of approximately 300 delegates, the Summit brought together 105 Single Family Offices and 165 total investors across SFOs, MFOs, OCIOs, and consultants.

The event was structured around quality of access rather than scale. With an approximate 50/50 GP/SP–LP mix, the room maintained meaningful allocator density while preserving a focused environment for sponsors, members, and investors.



Audience

The defining feature of the Summit was the concentration of Single Family Offices. The audience was anchored by 105 SFOs, with a majority Canadian SFO presence and select international perspectives represented through speakers and participants.

It included family principals, full-time SFO professionals, MFOs, OCIOs, consultants, asset managers, and service providers, creating a high-relevance room where most interactions had a clear institutional or family office context.



What Made It Different

The Summit was differentiated by structure. Day 1 began with SFO-only roundtables, split between family members and SFO professionals, followed by SFO-only breakout sessions.

Engagement was strongest where the format was most specific. The roundtables and breakout sessions created peer-level dialogue around governance, mistakes and missed opportunities, private equity allocation, AI adoption, co-investing, and liquidity pressure.

That sequencing mattered. By bringing SFOs together first in a closed-door setting, then opening the room to sponsors, managers, service providers, and other investors, the reception had unusually high LP density and a stronger sense of relevance than a standard conference networking function.



SINGLE FAMILY OFFICE SESSIONS SPEAKERS



Adrian Barber
President
Barber & Associates



Stephen Bloom
Founder
Batl Capital LP



Drew Colaiezzi
Private Investments
McPike Global Family Office



Russell Deakin
CIO and Managing Partner
Aceana Group



Dominik v. Eynern
Founding Member
Family Hippocampus



Peter Fletcher
Managing Director
PHF Capital Inc.



Andrew Garrett
Chief Investment Officer
Ruck Lane Inc.



Anmol Goel
CEO & Investor
GACS Family Office



Andrew Hamlin
Vice President and Portfolio Manager
Federated Capital



Geraldine Hardy



You-Ha Hyun
Principal
Perpetual Investors GmbH



Yahya Mahmoud
President
BNQ Group



Trevor Maunder
President & Chief Executive Officer
Peerage Capital



Robert Montgomery
Chief Executive Officer
First Maximilian Associates Inc.



Ian Morley
Chairman
Wentworth Hall Consultancy Ltd



Scott Morrison
Chief Investment Officer
Wealhouse Capital Management



Octavian Graf Pilati
Founder
The Antifragile Family



Jay Rosenfeld
Director of Business Development
Peerage Capital & Artemis



Gabrielle (Ellie) Rubenstein
Co-Founder and Managing Partner
Manna Tree



Jeff Szeto
CFO & Lead Investor
Avana Capital & Alder Capital Sustainable Ventures

2026 Conference Stats - Day 1



DAY 1 – 105 SINGLE FAMILY OFFICES DELEGATES
+ RECEPTION FOR ALL REGISTERED DELEGATES

- SFO Relatives - 52%
- SFO Professionals - 48%





Single Family Office Sessions

- Single Family Office Roundtable (Relatives Only)

Instigators : **Dominik v. Eynern**, Family Hippocampus, **Stephen Bloom**, Batl Capital LP, **Ian Morley**, Wentworth Hall Consultancy Ltd, **Octavian Graf Pilati**, The Antifragile Family, **Robert Montgomery**, First Maximilian Associates Inc., **Russell Deakin**, Aceana Group, **Peter Fletcher**, Club b

- Single Family Office Roundtables (Professionals Only)

Instigators : **Andrew Garrett**, Ruck Lane Inc., **Scott Morrison**, Wealhouse, **Andrew Hamlin**, Federated Capital, **Drew Colaiezzi**, McPike Global Family Office

- Break Out – Rethinking Family Governance – an Iconoclastic Approach (Family Members Only)

Leaders : **Octavian Graf Pilati**, The Antifragile Family **Dominik v. Eynern**, Family Hippocampus



Single Family Office Sessions

- Break Out - What Hasn't Worked: Mistakes and Missed Opportunities

Leaders : **You-Ha Hyun**, Perpetual Investors GmbH, **Jay Rosenfeld**, Peerage Capital & Artemis



- Break Out - How Private Equity Is Evolving: Where Are Families Leaning Today?

Instigators : **Gabrielle (Ellie) Rubenstein**, Manna Tree, **Drew Colaiezzi**, McPike Global Family Office

- Break Out - AI in Practice: How Family Offices Are Actually Using It

Leaders : **Jeff Szeto**, Avana Capital



- Break Out – Co-Investing with Other Families

Leaders : **Yahya Mahmoud**, BNQ Group, **Anmol Goel**, GACS Family Office

- Break Out – Managing Liquidity & Underperforming Managers

Leaders : Adrian Barber, Barber & Associates, **Peter Fletcher**, PHF Capital inc

2026 SPEAKERS



Nancy Bertrand



Kelly Burke

*Co-Founder & Partner
Chamberlain Family
Office Advisors*



James Burron

*Founding Partner
CAASA*



River Ewing

*Director
Hadley Family Office*



Saad Hassan

*Principal and North American Head
Hassan Family Office*



Earl Hunt

*Partner, Credit
Apollo*



Michael Keenan

*Chief Investment Officer
1642 Capital*



Bryan Kelly

*Principal
AQR Capital Management*



Kevin Little

*Portfolio Manager
KF Matheson Investment
Holdings*



Colin Lynch

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



Alex Massi

*Chief Investment Officer
Wileys Bay Investments*



Greg Moore

*Partner, Portfolio Manager
Richter Family Office*



Miles S. Nadal

*Founder & Executive Chairman
Peerage Capital*



Edward Portet

*Vice President, Finance
MAVRIK*



Mathew Powley

*Partner
Stonehage Fleming*



François Ritchot

*Investment Director
Sagana*



Andrew Sarna

*Portfolio Manager
Forthlane Partner*



Catherine Shiang

*Managing Director
Asia Capital Advisor, Ltd*



Marjorie Skolnik

*Managing Director
CI Coriel Capital Inc.*

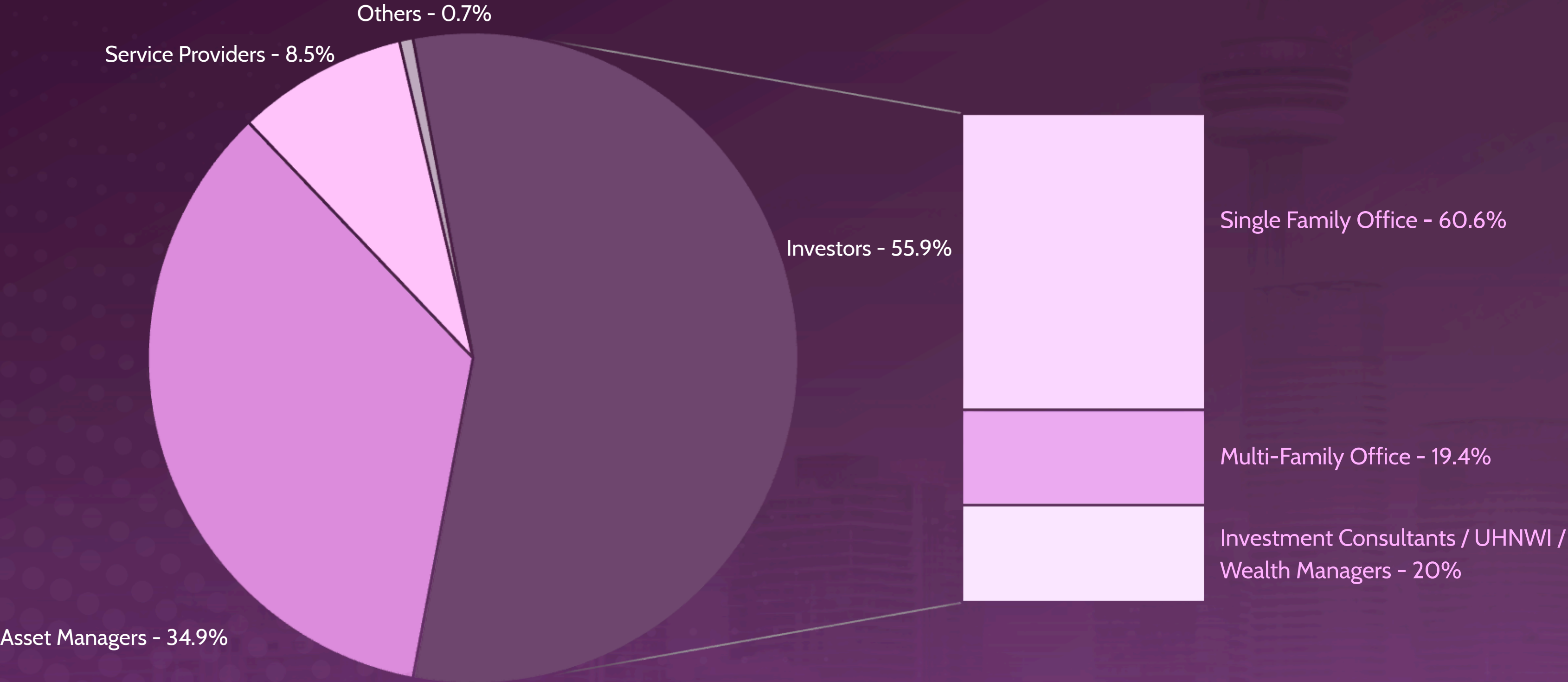


Mike Woollatt

*Head of Americas, Client
Solutions
Hamilton Lane*

2026 Conference Stats - Day 2

DAY 2 - 295 DELEGATES
OPEN TO ALL REGISTERED DELEGATES



Engagement & Participation

The Summit provided approximately 7.5 hours of dedicated networking time across two days, giving delegates multiple ways to connect beyond panel breaks.

Sponsor Table Talks added another structured layer of engagement. These 45-minute, opt-in sessions allowed delegates to self-select into focused small-group discussions based on specific investment themes, strategies, and areas of interest, creating more relevant sponsor interactions and repeated points of contact throughout the Summit.

between peer discussion, 1:1 meetings, reception networking, meals, breaks, and Table Talks, creating repeated points of contact in a setting designed for substance rather than volume.



MORNING SPONSOR TABLE TALKS

1.



Capital Direct | Income Trust

An Alternative Approach to Fixed Income

2.



3iQ

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

3.



Capital Fund Management (CFM)

Escaping Flatland: Rethinking Diversification with Systematic Strategies

4.



Crescero Natural Capital Inc.

Insights and Opportunities in Farmland Investing

5.



iCapital Network

Facilitating Access to Leading Managers for Private Wealth Investors

6.



IPEM

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

7.



Letko, Brosseau & Associates Inc.

Letko, Brosseau Emerging Markets – An absolute return strategy without private market liquidity concerns

8.



Mass General Brigham

Brain Care Score: Protecting and Improving Brain Health

9.



Wilshire

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



AFTERNOON SPONSOR TABLE TALKS

1.



Asset Management One USA
Unlocking Systematic Diversification

2.



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

3.



Ellipsis AM
Risk Mitigation Strategies : turning volatility into opportunity

4.



Family Hippocampus
Family Dynamics and Formal Family Governance in Dialogue

5.



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

6.



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

7.



Richter Family Office
Family Office Trends

8.



TD Asset Management
Private Infrastructure

9.



Torys LLP
When Family Disaster Strikes: Lessons from Common Mistakes

10.



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

Conference Agenda

- The Future of Consumer Health and Wellness:
Where Purpose Meets Private Equity Returns
Panelists : **Gabrielle (Ellie) Rubenstein**, Manna Tree, **François Ritchot**, Sagana
- Applying AI in the Real World: From Family Office Operations to Systematic Investing
Panelists : **Bryan Kelly**, AQR Capital Management, **Jeff Szeto**, Avana Capital & Alder Capital Sustainable Ventures
- The Professionalization of Family Office Private Markets Investing
Panelists : **Mathew Powley**, Stonehage Fleming
- Tough Questions on Evergreens
Panelists : **Drew Colaiezzi**, McPike Global Family Office, **Colin Lynch**, TD Asset Management Inc., **Mike Woollatt**, Hamilton Lane, **Mathew Powley**, Stonehage Fleming



Conference Agenda

- Legacy and Learning: Philanthropy Across Generations

Panelists : **Greg Moore**, Richter Family Office, **Octavian Graf Pilati**, The Antifragile Family, **River Ewing**, Hadley Family Office

- Looking Abroad: Where Family Offices Are Finding Opportunity Globally

Panelists : **Kelly Burke**, Chamberlain Family Office Advisors, **You-Ha Hyun**, Perpetual Investors GmbH, **Edward Portet**, MAVRIK **Anmol Goel**, GACS Family Office

- The Next Phase of Private Credit: Navigating Risk and Global Uncertainty

Panelists : **Earl Hunt**, Apollo, **Nancy Bertrand**

- Defining Success: The Many Dimensions of a Family Office Mandate

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



Conference Agenda

- Inside the Family Portfolio
Panelists : **Alex Massi**, Wileys Bay Investments, **Andrew Hamlin**, Federated Capital, **Kevin Little**, KF Matheson Investment Holdings
- Builder & Steward: The Founder & CEO Dynamic
Inside a Modern Family Office
Panelists : **Miles S. Nadal**, Peerage Capital, **Trevor Maunder**, Peerage Capital
- MFO Round-Up: Perspectives from Multi-Family Office Leaders
Panelists : **James Burron**, CAASA, **Marjorie Skolnik**, CI Coriel Capital Inc., **Andrew Sarna**, Forthlane Partner, **Michael Keenan**, 1642 Capital



Positioning & Takeaways...

The Summit reinforced CAASA's position as a leading Canadian platform for family office and alternative investment dialogue. Its value was driven by the quality of the room, the density of SFO participation, and the deliberate design of the agenda.

The event also showed how family office conversations are evolving. The focus has moved beyond access and allocation alone toward governance, operational sophistication, liquidity discipline, direct investing, co-investment alignment, and institutional-grade portfolio construction.

The result was a summit defined by curation, access, and audience quality. For sponsors and members, the value was not simply attendance; it was proximity to a carefully assembled room of family offices and investors engaged in relevant, practical, and commercially meaningful discussion.



CONFERENCE PARTICIPANTS

85 SFO firms representing 105 SFO delegates are not listed publicly.

- 1642 Capital
- 1Bitcoin
- 3iQ Corp.
- Abaris Capital
- AGF Capital Partners
- Alliance REIT
- Apollo Global Management
- AQR Capital Management
- Area One Farms Ltd.
- Arthur Butler
- Ascendi Capital Inc
- Asset Management One USA
- BDO Canada LLP
- Beutel Goodman & Co.
- BlackTusk Group Inc.
- Bloom Family Office
- BMO Global Asset Management
- Bodhi Research Group
- BridgeMe Securities Inc.
- CanFirst Capital Management
- Capital Direct Management Ltd.
- Capital Fund Management
- Carte Wealth Management Inc

- Cidel
- Citi
- City Flats Asset Management
- Coller Capital Limited
- Coriel Capital Inc.
- Corpay Cross-Border
- Crescero Natural Capital Inc.
- Creskar Capital Management Inc.
- Dawson Partners Inc.
- DeepAim Technologies Inc.
- Delbrook Capital
- Designed Securities Ltd.
- Durum Capital Inc
- Ellipsis AM
- Epic Funds
- Equiton Inc.
- Family Hippocampus Ltd
- FAX Capital
- Finalta Capital
- Financial Modeling Prep
- FirePower Capital
- First Affiliated Holdings
- Forthlane Partners
- Golub Capital
- GreenSky Ventures
- Greybrook
- Greyhill Capital Partners
- Hamilton Lane

- Harbourfront Wealth
- HGC Investment Management Inc
- Highline Beta
- iCapital Network
- Impactful Capital
- Independent Advisor Solutions
- International Private Equity Market (IPEM)
- Jisrak
- JLL
- Jolt Capital
- JP Morgan Private Bank
- Karrion Capital Partners Inc.
- Kayne Anderson Capital Advisors L.P.
- Kaywood Capital Family Office
- Kepler Cheuvreux
- Keystone Farmland
- KJ Harrison Investors
- Kudu Investment Management, LLC.
- Kudu Investments
- Letko, Brosseau & Associates Inc.
- Longview Asset Management
- Loop Financial Inc.
- M² Equity Partners
- Manna Tree
- Mass General Brigham
- Mercer
- Merchant Opportunities Fund



CONFERENCE PARTICIPANTS

85 SFO firms representing 105 SFO delegates are not listed publicly.

- Miller Thomson LLP
- Morgan Stanley Wealth Management
- Nearctic Property Group
- NEI Investments
- Neuberger Berman
- Northside Ventures
- Norton Rose Fulbright
- Nvestiv
- Olympic Precious Metals
- Omnigence Asset Management
- Orchard Global Asset Management / OGAM Ltd
- Our Family Office Inc
- ParaFi
- Patrimonica Family Office
- PBY Capital Ltd.
- PenderFund Capital Management
- Peninsula Capital Corp.
- Phoenix Capital
- Picton Mahoney Asset Management

- Pinnacle Investment Management
- Portfolio HiWay
- Prime Quadrant
- RBC Investor Services
- Realstar Corp.
- ReSolve Asset Management
- Richter Family Office
- Ruken Capital
- Sagana
- Scotia Wealth
- Sigma2 Family Office Inc
- Skyline Wealth
- Sofistic.ai
- Spira Equity Partners
- Star Mountain Capital
- Stonehage Fleming
- Stormont Partners
- Talson Capital Management
- TCU Development Corporation
- TD Asset Management
- The Chamberlain Advisors
- Theia Partners Inc.
- TMO Capital Partners
- Torys LLP
- Trans-Canada Capital Inc

- TrueBridge Capital
- VELA Wealth Management Inc
- Veritable Wealth Advisory
- Virgo Digital Asset Management
- Wealhouse Capital Management
- Wealth Write.Up
- Wealthsimple
- Wellington-Altus Private Wealth
- Westcourt Capital Corp.
- Wilshire
- Winner Capital
- XIB Asset Management
- Yardi
- Yorkville Asset Management
- YTM Capital Asset Management



Conference Gallery

Click here to view our gallery:

<https://caasa.ca/family-office-summit-2026-gallery>



Enjoy a complimentary 6-month trial to Octavian Graf Pilati's (*Founder, The Antifragile Family*) Substack publication.

Please see the redemption code below, which will remain valid until October 30, 2026.

<https://antifragilefamily.substack.com/caasa26>

THANK YOU TO OUR 2026 SPONSORS AND PARTNERS

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FAMILY OFFICE SUMMIT 2027

APRIL 27-28, 2027

TORONTO - ONTARIO

Toronto Board of Trade

Scan the QR code or click the link here :
<https://caasa.ca/archives/events/family-office-summit-2027>

