



CAASA'S 2027 MONTRÉAL EDITION

FAMILY OFFICE

SUMMIT

SPONSOR GUIDE



SPONSORSHIP LEVELS

MEMBERS ASK - WE DELIVER

We strive to deliver the most compelling conferences & events, inspired by your feedback. Elevate your event experience, and join us in 2026 as we unveil a new range of sponsorship opportunities, tailored to meet our members' needs and provide the exposure levels they are seeking.



2027 Platinum Sponsor

Offers your company the highest level of visibility and be exclusively showcased at each CAASA event we host in 2027. In addition to all the benefits featured in the Gold Sponsor package, our Platinum Sponsor receives an exhibit booth (valued at \$2,000), has a first call on all additional and enhanced sponsor items (see page 5 & 6 respectively) at each of their chosen conferences, and has a comp opportunity to be Title Sponsor at one of our 2027 events.

Conference Title Sponsor

Each CAASA conference, summit and forum will feature a single Title Sponsor. Title Sponsors receive all the benefits from the Gold Sponsor package, plus recognition as program sponsor, having their logo showcased on the program front cover along with a full-page advertisement on the back cover. Additionally, a two-page spread inside the program, and excellent visibility to all attendees as the conference messaging & meeting app sponsor. As the app sponsor, your corporate logo will be displayed on the splash screen every time a user accesses the platform (mobile and desktop), and on each email sent to delegates via the app. Title Sponsors also receive second call on additional and enhanced sponsor items (see page 5 & 6 respectively).

2027 Gold Sponsors

2026 Gold Sponsors will be highlighted together at every conference and event, CAASA hosts in 2027. In addition to the benefits offered through a Silver Sponsorship package, members of this level will receive third call on all enhanced sponsor items (see page 5 & 6 respectively), along with a full-page advertisement in the relevant conference program. Gold Sponsors will also be provided a discounted price to be a Title Sponsor for the conference, if available.

Conference Silver Sponsor

In addition to benefits featured in the Bronze Sponsor package, Silver Sponsors will also be entitled to a Table Talk session. During CAASA conferences, summits, and forums, sponsors of this exclusive package will be provided the opportunity to host one 45-minute roundtable discussions.

Conference Bronze Sponsor

Sponsors of this package will be provide a ½-page advertisement in the printed conference program; logo placement on the event page, all marketing collaterals and at the conference venue; complimentary sponsor item and be provided the opportunity to purchase enhanced sponsor items (see page 5 & 6 respectively).

SPONSORSHIP LEVELS

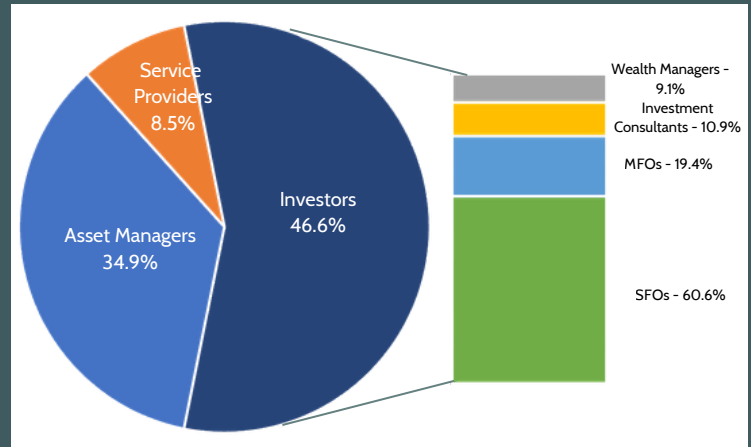
Complimentary Booth at all CAASA conferences attended					
Plantinum Sponsor banner at all 2027 CAASA events					
Gold Sponsor banner at all 2027 CAASA events					
One Complimentary Title Sponsorship					
Discounted Title Sponsorship			25 - 50% Disc		25-50% Disc
Program Sponsor with logo on front cover and full page advertisement on back cover					
Two Page Spread Advertisement					
Additional Full Page Advertisement	\$1,000	\$1,000			
Table Talk - Host one 45 minute session					
Opportunity to purchase enhanced sponsor items (page 18)					
Complimentary additional sponsor item (page 19)					
Logo placement on the event page, marketing emails, and at the conference venue					
1/2 page advertisement in the printed conference program					
	Bronze	Silver	2027 Gold	Title	2027 Platinum

FAMILY OFFICE SUMMIT 2027 - MONTRÉAL

SEPTEMBER 21-22, 2027 - MONTRÉAL

THE FAMILY OFFICE SUMMIT IS A CONFERENCE DESIGNED TO BRING IN SINGLE FAMILY OFFICES AND MULTI-FAMILY OFFICES, WHERE WE COVER AN ARRAY OF ALTERNATIVE STRATEGIES AND TOPICS SPECIFICALLY TAILORED FOR THE FAMILIES.

	Pricing
Bronze Sponsor	\$3,500 \$4,200 after Aug. 30th, 2027
Silver Sponsor	\$5,000 \$6,000 after Aug. 30th, 2027
Title Sponsor	\$20,000 \$24,000 after Aug. 30th, 2027 \$15,000 for 2026 Gold Sponsors Complimentary for 2026 Platinum Sponsor



[click here for the 2026 delegate list](#)

DELEGATE TYPE	BEFORE NOV. 1, 2026 5% OFF ORIGINAL PRICING	AS OF NOV. 1, 2026 INCREASE OF \$250	AS OF JULY 21, 2027 INCREASE OF \$250	AS OF AUG. 20, 2027 INCREASE OF \$250	AS OF SEPT. 14, 2027 INCREASE OF \$250
Single Family Office (including non-members)	Complimentary	Complimentary	Complimentary	Complimentary	Complimentary
Investment Advisors	Complimentary	Complimentary	Complimentary	Complimentary	Complimentary
Intermediary Investor/Consultant +1	\$160	\$160	\$160	\$160	\$160
Ancillary Service Provider	\$1662.5 (prev. \$1,750)	\$2,000	\$2,250	\$2,500	\$2,750
Core Service Provider	\$2,612.5 (prev. \$2,750)	\$3,000	\$3,250	\$3,500	\$3,750
Asset Managers					
<50 Million AUM	\$1,187.5 (prev. \$1,250)	\$1,500	\$1,750	\$2,000	\$2,250
50 - 500 Million AUM	\$1662.5 (prev. \$1,750)	\$2,000	\$2,250	\$2,500	\$2,750
500 - 1,000 Million AUM	\$2137.5 (prev. \$2,250)	\$2,500	\$2,750	\$3,000	\$3,250
>1 Billion AUM	\$2,612.5 (prev. \$2,750)	\$3,000	\$3,250	\$3,500	\$3,750

Intermediary investors means Multi-family offices and investment consulting companies and +1 means the first delegate is gratis but each additional delegate attracts a small charge. Manager, investment advisor and service provider delegates must be CAASA members in good standing and pay the requisite per person fee for their appropriate category. Core service providers include prime brokers, fund administrators, accounting and legal firms.

[View 2026 Program](#)

[View 2027 Event Page](#)

[View 2026 Event Page](#)



Thank you to our
past Sponsors



COMPLIMENTARY SPONSOR EXPOSURE ITEMS

All conference sponsors are eligible to receive, without additional cost, the following exposure items at our in-person conferences (as applicable to the program and venue capacity/capabilities):

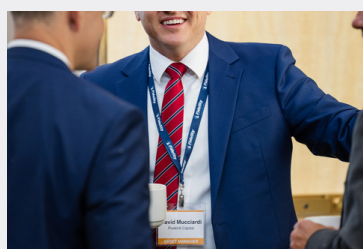
These exposure items are apportioned on a first-come basis to members as they commit to sponsoring the event. Platinum Sponsors have first call on any remaining item from when they commit to that level of sponsorship and Gold Sponsors have next call on any remaining item once Platinum Sponsors have had their turn. (Gold Sponsors will receive their option at least one month prior to the event, in any case.) Choice of exposure items then goes to other sponsors in the order in which the committed to the conference.

When a speaker might be keynote during a meal, sponsorship does not include any sort of speaking (intro, thanks, moderation, nor presentation) by the member. Their attachment to the timing will be mentioned and, as applicable, acknowledged visually but that is it.

- Breakfast
- Morning Break
- Lunch
- Afternoon Break
- Evening Reception (may include wine-tasting or the like)
- Tête-à-tête meeting times (usually 1 per day)
- Lanyards (provided and delivered by the member)
- Portable phone chargers



Meals & Breaks



Lanyards (provided by sponsor)



Phone Chargers (stickers provided by sponsor)



Evening Reception



Tête-à-têtes

And More....

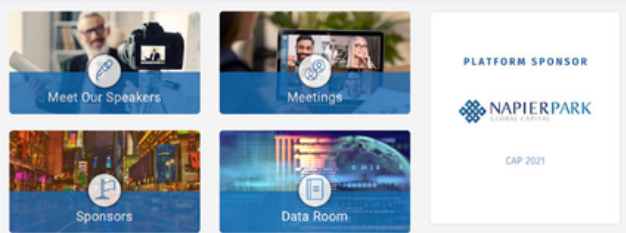
ENHANCED SPONSOR EXPOSURE ITEMS

A Plethora of Sponsorship Opportunities



These exposure items are purchased on a first-come basis to members as they commit to sponsoring the event. Platinum Sponsors have first call on any remaining item from when they commit to that level of sponsorship and Gold Sponsors have next call on any remaining item once Platinum Sponsors have had their turn. (Gold Sponsors will receive their option at least one month prior to the event, in any case.) Choice of exposure items then goes to other sponsors in the order in which they committed to the conference.

- Hotel keycards (CAASA Annual Conference): usually \$1,500 for the keycard logo placement + \$500 for keycard protective sleeve logo placement
- Program (logo on cover page): \$1,500 per conference
- Meeting platform (logo on each login page and emails): \$3,000 per conference
- Espresso coffee bar & barista (including logo placement on froth): TBD; likely \$3,000
- Others as they present themselves...



Meeting Platform (\$3,000)



Hotel key cards (\$1,500+)



Fancy Coffee (~\$3,000)

Booth (\$2,000)

And More....

FAMILY OFFICE SUMMIT 2026

DELEGATE LIST (1/3)

270 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 78 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 48% INVESTORS (78 SFOS, 21 FROM MFOS), 41% MANAGERS, 10% SERVICE PROVIDERS.

- 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 Asset Management
- 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

FAMILY OFFICE SUMMIT 2026

DELEGATE LIST (2/3)

270 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 78 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 48% INVESTORS (78 SFOS, 21 FROM MFOS), 41% MANAGERS, 10% SERVICE PROVIDERS.

- 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
- Miller Thomson LLP
- Morgan Stanley Private Wealth Management
- 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
- Prime Quadrant LP
- Private Family Office
- 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

FAMILY OFFICE SUMMIT 2026

DELEGATE LIST (3/3)

270 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 78 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME FOS SENT MULTIPLE DELEGATES. 48% INVESTORS (78 SFOS, 21 FROM MFOS), 41% MANAGERS, 10% SERVICE PROVIDERS.

- 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

Special Thanks to our 2026 Platinum Partner



2026 Gold Partners



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

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