



CAASA'S 2027 WEALTH MANAGERS' FORUM 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

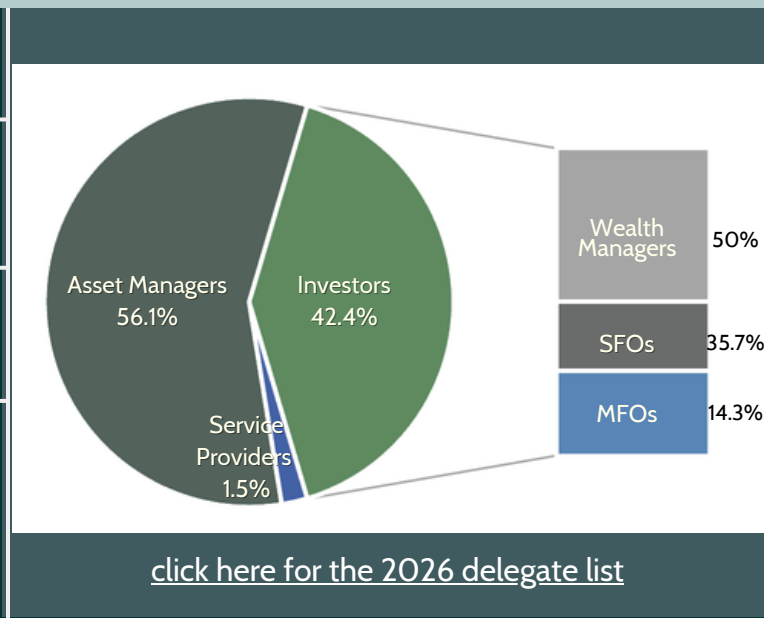
Complimentary Booth at all CAASA conferences attended					
Plantinum Sponsor banner at all 2027 CAASA events					
Gold Sponsor banner at all 2027 CAASA events					
One Complimentary Title Sponsorship					
Discounted Title Sponsorship			25 - 50% Disc		25-50% Disc
Program Sponsor with logo on front cover 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

WEALTH MANAGERS' FORUM 2027

JUNE 1, 2027 - TORONTO

JOIN US, DOZENS OF SPEAKERS, AND SCORES OF FELLOW IAS AND INVESTORS FOR THIS ALL-ENCOMPASSING ALTS CONFERENCE
SPECIFICALLY DESIGNED FOR RETAIL ADVISORS AND THE CLIENT BASE THEY SERVE.

	Pricing
Bronze Sponsor	\$2,500 \$3,000 after May 11th, 2027
Silver Sponsor	\$3,500 \$4,200 after May 11th, 2027
Title Sponsor	\$10,000 \$12,000 after May 11th, 2027 \$5,000 for 2027 Gold Sponsors Complimentary for 2027 Platinum Sponsor



DELEGATE TYPE	BEFORE NOV. 1, 2026 5% OFF ORIGINAL PRICING	AS OF NOV. 1, 2026 INCREASE OF \$250	AS OF APRIL 1, 2027 INCREASE OF \$250	AS OF MAY 1, 2027 INCREASE OF \$250	AS OF MAY 27, 2027 INCREASE OF \$250
Investors	Complimentary	Complimentary	Complimentary	Complimentary	Complimentary
Asset Managers (CAASA Members)	\$950 (prev. \$1,000)	\$1,250	\$1,500	\$1,750	\$2,000
Service Providers (CAASA Members)	\$950 (prev. \$1,000)	\$1,250	\$1,500	\$1,750	\$2,000

Investor means Investment Advisors, Single Family Offices, and Multi-Family Offices.

[View 2026 Program](#)

[2027 Event Page](#)

[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.

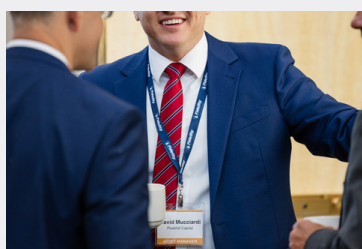
When a speaker might be keynote during a meal, sponsorship does not include any sort of speaking (intro, thanks, moderation, nor presentation) by the member. Their attachment to the timing will be mentioned and, as applicable, acknowledged visually but that is it.



- 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....

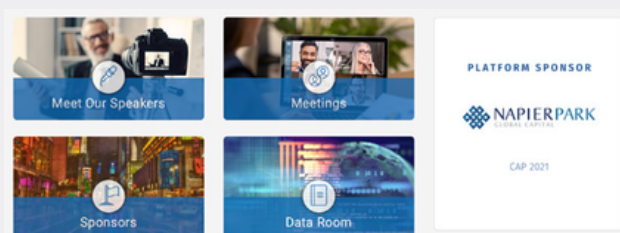
ENHANCED SPONSOR EXPOSURE ITEMS

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....

WEALTH MANAGERS FORUM 2026

DELEGATE LIST

66 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 42% INVESTORS, 56% MANAGERS, 2% SERVICE PROVIDERS

- 3iQ Corp.
- AllMind AI
- AlphaBlock Technologies Inc.
- Area One Farms
- Asset Management One USA
- Barber & Associates
- BDO
- Blacktyde Capital
- Bright Mega Capital
- Canada Life
- Capital Direct Management Ltd.
- Carte Wealth Management Inc
- Celina Capital
- CME Group
- Coller Capital Limited
- Crescero Natural Capital Inc.
- Croesus
- Designed Securities Ltd.
- East West Investment Management
- Edward Jones
- Equiton Inc.
- Fiduciary Trust Canada
- FirePower Capital
- FutureSight Ventures
- GreenBear Group LLC
- Greybrook
- Harbourfront Wealth
- HGC Investment Management Inc
- Huxton Black
- iCapital Network
- Infinity Global Capital
- K2 Group
- KJ Harrison Investors
- Koh Capital Management
- Letko, Brosseau & Associates Inc.
- Mandeville Private Client
- Manna Tree
- Manulife Wealth
- Mass General Brigham
- MLW Private Wealth
- Morgan Stanley Wealth Management
- Nymbus Capital
- Omnigence Asset Management
- Orchard Global Asset Management / OGAM Ltd
- Park Private Wealth
- PBY Capital Ltd.
- Prime Quadrant
- RBC Dominion Securities
- RBC Investor Services
- ReSolve Asset Management
- Richardson Wealth
- Ruck Lane Inc.
- Sagard
- Sagard Wealth
- Scotia Wealth
- Semper8
- The Farmer Group
- Torys Law Firm LLP
- Verecan
- Vernier Capital Advisors
- Yorkville 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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