CAASA
CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

PRESENTED BY: THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

CAASA ALTERNATIVE PERSPECTIVES 2026: PRIVATE MARKET FOCUS

THURSDAY, SEPTEMBER 17TH





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(1) Annualized return is based on Q2 2026 net income produced by that class of Units of the Trust after any discretionary reduction by Management in Income Participation. (2) Class F Units must be purchased through a third-party dealer and are intended for fee-based accounts. | All investments carry risks and past performance is not an indication of future returns. This does not constitute an offer to the public to subscribe for units of the Trust. This document does not provide disclosure of all information required for an investor to make an informed investment decision. All subscriptions for the purchase of units must be made pursuant to available prospectus exemptions. Investors should read the current offering memorandum, especially the risk factors relating to a purchase of Units of the Trust, prior to making an investment decision.

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

3iQ

Forging New Paths in Alternative Investing

Founded in 2012, 3iQ is a global leader in digital asset management with a proven track record in innovation, regulatory compliance, and robust risk management, offering institutional-quality investment solutions designed for the modern financial landscape.

Single & Multi-Asset Exposure

Gain secure, regulated access to leading digital assets through our innovative ETFs.

Active Management

Leverage expert managers and multi-strategy approaches to capture growth, manage risk, and provide portfolio diversification in the evolving digital asset market.

Yield Solutions

Optimize returns through actively managed digital asset strategies and innovative yield solutions with a focus on minimizing risk and safeguarding investor capital.

Invest in the future today

These materials do not constitute an offer to sell or issue or the solicitation of an offer to buy or subscribe for securities in any jurisdiction. Investors should seek advice from professional advisors prior to making any investment decisions. Prospective investors must not rely on this document as part of any assessment of any potential investment and should not treat the contents of this document as advice relating to legal, taxation, financial or investment matters. Prospective investors are strongly advised to make their own inquiries and consult their own professional advisers as to the legal, tax, accounting and related matters concerning the acquisition, holding or disposal of an investment. Commissions, trailing commissions, management fees and expenses all may be associated with ETF investments. Please read the prospectus before investing. You will usually pay brokerage fees to your dealer if you purchase or sell units of an ETF on the Toronto Stock Exchange, or other alternative trading system (an "exchange"). If the units are purchased or sold on an exchange, investors may pay more than the current net asset value when buying units of an ETF and may receive less than the current net asset value when selling them.

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 September 16th 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 Wednesday, September 16th 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 Wednesday, September 16th 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 CAASA ALTERNATIVE PERSPECTIVES 2026

We consistently strive to bring our audiences innovative speakers sharing their perspectives on topical issues, in a format that allows attendees to get the most from both the content and their interactions.

CAASA Alternative Perspectives brings together institutional investors, family offices, GPs, asset managers, and service providers for a full day focused on private markets, including private equity, private credit, real assets, infrastructure, venture capital, and other alternative investment strategies.

As always, our focus is on **content and education without sponsored speaking spots**, with panels predominantly featuring hand-picked asset owners and allocators. Attendees will also have dedicated **1:1 meeting opportunities and Table Talks** to dig deeper into the topics and make meaningful connections.

Our event app allows attendees to connect directly before and during the conference, as CAASA does not share attendee contact information.

All content is held under the Chatham House Rule.

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CAASA ALTERNATIVE PERSPECTIVES 2026
THURSDAY, SEPT 17TH AGENDA

9:00 AM	**Registration & Breakfast**
9:30 AM	**From Approval to Allocation: Bringing Private Markets onto Wealth Platforms** Demand for private-market investments continues to grow across the Canadian wealth channel, but getting a strategy approved—and successfully adopted—is a complex process. This panel will bring together leaders from Canadian investment dealers to discuss product due diligence, Know Your Product and suitability requirements, operational integration, valuation and reporting, liquidity expectations, advisor education and client communication. The discussion will examine what makes a private-market offering scalable, why some products stall during review, and how managers can become stronger long-term partners to dealers and advisors. **Fardan Ali,** Designed Wealth Management**, Wilson Tow,** Altrust Investment Solutions**, Ryan Tomicic,** Borden Ladner Gervais LLP
10:00 AM	**Private Markets at Scale: Deployment, Liquidity and the Next Return Cycle** Large private-market platforms are navigating a markedly different environment for deployment, financing, realizations and investor liquidity. Bringing together perspectives from direct lending, portfolio finance and diversified private capital, this panel will examine where scaled managers are finding compelling opportunities and how underwriting standards are evolving. The speakers will discuss portfolio-company fundamentals, private credit, secondary and liquidity solutions, co-investments, value creation, exit pathways and the changing expectations that institutional LPs bring to their GP relationships. **Josh Booth,** Dawson Partners**, David Manzano,** Golub Capital**, Daniel Cohen,** EQT Group**, Sean O'Hara,** Obsiido Alternative Investments Inc.
10:45 AM	**Table Talks** Your opportunity to join a table and discuss the topic on offer, lead by one of our sponsoring CAASA members.

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CAASA ALTERNATIVE PERSPECTIVES

SPONSOR TABLE TALKS

10:45 AM - 11:30 AM

1. **Capital Direct**
An Alternative Approach to Fixed Income



Gord Ross
Regional VP, 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 for Best 1-Year Return.

2. **3iQ**
The Capital Allocation Puzzle: Why Institutions Are Moving into Digital Assets



Rachel Kirkwood
Investment Specialist at 3iQ

Institutional investors are moving beyond speculation and increasingly gaining exposure to digital assets as a strategic component of portfolio construction. But key questions remain: where does digital asset exposure fit, how much should be allocated, and which approaches make sense? This conversation explores how leading institutions are approaching digital asset allocation and the range of portfolio solutions available.

3. **Crescero Natural Capital**
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.

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



Tom Johnston
MD, Client Solutions Americas

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.

Crescero presents

Canadian Agriculture Investment Forum 2026 October 1, Toronto

A new national forum convening leaders across agriculture, asset management, institutional asset owners, banking and capital markets, policymakers, and technology, to explore how capital is engaging and where opportunities are emerging, across Canada's agricultural landscape.



Crescero NATURAL CAPITAL

To learn more about the event, please visit crescero.com and click *Canadian Agriculture Investment Forum*.

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3iQ

Forging New Paths in Alternative Investing

Founded in 2012, 3iQ is a global leader in digital asset management with a proven track record in innovation, regulatory compliance, and robust risk management, offering institutional-quality investment solutions designed for the modern financial landscape.

Single & Multi-Asset Exposure

Gain secure, regulated access to leading digital assets through our innovative ETFs.

Active Management

Leverage expert managers and multi-strategy approaches to capture growth, manage risk, and provide portfolio diversification in the evolving digital asset market.

Yield Solutions

Optimize returns through actively managed digital asset strategies and innovative yield solutions with a focus on minimizing risk and safeguarding investor capital.

Invest in the future today

These materials do not constitute an offer to sell or issue or the solicitation of an offer to buy or subscribe for securities in any jurisdiction. Investors should seek advice from professional advisors prior to making any investment decisions. Prospective investors must not rely on this document as part of any assessment of any potential investment and should not treat the contents of this document as advice relating to legal, taxation, financial or investment matters. Prospective investors are strongly advised to make their own inquiries and consult their own professional advisers as to the legal, tax, accounting and related matters concerning the acquisition, holding or disposal of an investment. Commissions, trailing commissions, management fees and expenses all may be associated with ETF investments. Please read the prospectus before investing. You will usually pay brokerage fees to your dealer if you purchase or sell units of an ETF on the Toronto Stock Exchange, or other alternative trading system (an "exchange"). If the units are purchased or sold on an exchange, investors may pay more than the current net asset value when buying units of an ETF and may receive less than the current net asset value when selling them.

CAASA ALTERNATIVE PERSPECTIVES 2026
THURSDAY, SEPT 17TH AGENDA

11:30 AM	**Essential Assets: Investing in Healthcare, Farmland and Critical Industrial Capacity** Some investment opportunities are supported not simply by economic growth, but by services and assets that society cannot function without. This panel will examine healthcare infrastructure and services, Canadian farmland and agriculture, and critical industrial, aerospace and national-security capabilities. The speakers will discuss the secular forces supporting these sectors, including demographic change, food security, supply-chain resilience and geopolitical priorities, while also addressing regulation, capital intensity, operational execution, valuation, liquidity and the role these investments can play in a diversified private-markets portfolio. **Ralph Desando,** Yorkville Asset Management, **Kent Willmore,** Crescero Natural Capital, **Laurence Vigeant-Langlois,** AE Industrial Partners**,** LP, **Jean-François (J-F) Démoré,** Innova Wealth Partners
12:15 PM	**Lunch & Keynote: Building the AI-Native Asset Manager: Investing and Creating Value in the Age of AI** Keynote will begin at 12:45PM Artificial intelligence is moving rapidly from experimentation to a source of competitive advantage across private markets. Drawing on her experience leading AI strategy at Sagard, Parinaz Sobhani will explore what it means to build an AI-native asset manager — from how AI is changing research, diligence and investment decision-making to how it can drive measurable value creation across portfolio companies. With a background spanning AI research, venture investing and the application of AI across businesses, Parinaz will share where she is seeing the technology create real impact today, where expectations may be running ahead of reality, and how investment firms and their portfolio companies can position themselves as AI reshapes business models, competitive advantages and the investment process itself. **Parinaz Sobhani,** Sagard

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CAASA ALTERNATIVE PERSPECTIVES 2026
THURSDAY, SEPT 17TH AGENDA

1:15 PM	**The Direct Deal: Two Approaches to Investing** Two investors, two distinct approaches to direct investing. This fireside conversation will explore how River Ewing of Hadley Family Office and François Ritchot of SAGANA think about sourcing, evaluating, and pursuing direct investment opportunities, with each bringing a different perspective on the types of deals they target and how they assess where to deploy capital. The discussion will compare their respective approaches, highlight where their strategies differ, and explore what they are seeing in the direct investment landscape today. **River Ewing,** Hadley Family Office, **François Ritchot,** SAGANA
1:45 PM	**1:1 meetings / Morning Refresher** This is everyone's opportunity to meet – either as established via our conference meeting & messaging app or ad hoc
2:15 PM	**Mercer Private Markets Report 2026: Exits, AI and the New Access Landscape** This research-driven presentation will provide a concise assessment of the forces shaping private markets in 2026. Venelina Arduini will examine the outlook for exits and distributions, the expanding use of artificial intelligence across investment and portfolio-company operations, and the continued broadening of access to private-market strategies. The presentation will translate these developments into practical considerations for asset allocation, manager selection, portfolio construction, liquidity budgeting and governance—and identify where investors should remain particularly selective. **Venelina Arduini,** Mercer

CAASA ALTERNATIVE PERSPECTIVES 2026
THURSDAY, SEPT 17TH AGENDA

2:45 PM	**Market Outlook: Navigating a Changing Investment Landscape** North American investors are navigating a shifting landscape shaped by changing interest-rate dynamics, persistent fiscal pressures, evolving trade relationships, geopolitical uncertainty, and diverging economic conditions across Canada and the United States. This discussion will examine the forces likely to drive markets over the coming year and what they could mean for asset allocation, risk, and investment opportunities on both sides of the border. Drawing on decades of experience analyzing economic and capital-market cycles, Constance Everson will offer her perspective on where we are in the current cycle, the signals investors should be watching, and how portfolios may need to adapt as the North American investment environment continues to evolve. **Constance Everson,** Capital Markets Outlook Group, Inc
3:15 PM	**Inside the SFO Portfolio: How Families Are Investing in Private Markets Now** Single-family offices have considerable flexibility in how they allocate to private markets, but building a portfolio requires balancing access, manager selection, concentration, liquidity and long-term family objectives. This closing panel will explore how families construct their private-markets portfolios across private equity, private credit, real assets, venture capital and other alternatives, with particular attention to external manager selection and co-investments. The speakers will discuss what they look for when evaluating managers, what earns a manager a long-term relationship, how co-investments fit alongside fund commitments, how families think about portfolio construction and diversification, and how governance, liquidity needs and evolving family priorities influence allocation decisions over time. **Shael Soberano,** Sharno Group Inc., **Saad Hassan,** Hassan Family Office, **Adrian Barber,** Barber & Associates, **Andy Yan,** Westcourt Solutions
4:00 PM	**Reception** Time to make a few more connections and chat about the day
5:00 PM	**End of conference** See you at our next event!!

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!

KEYNOTE SPEAKER BIOGRAPHY



Parinaz Sobhani
Head of AI and Managing Director
Sagard

Parinaz Sobhani is Head of AI and Managing Director at Sagard, where she leads the firm's artificial intelligence strategy and drives innovation across its investment and operational platforms. Since joining in 2024, she has been at the forefront of transforming Sagard into an AI-native organization and accelerating the adoption of AI across its portfolio companies.

Prior to Sagard, Parinaz served as Head of AI at Georgian, a Toronto-based venture capital firm specializing in growth-stage B2B software. In that role, she helped develop the firm's investment thesis, making AI core to its investment strategy while building and scaling AI capabilities that delivered measurable competitive advantages for portfolio companies. Earlier in her career, Parinaz held research positions at Microsoft Research and the National Research Council of Canada, where she worked on natural language understanding and machine translation systems during the early days of transformers and large language models.

Parinaz holds a Ph.D. from the University of Ottawa in natural language understanding and brings over a decade of experience turning complex business challenges into high-impact AI solutions across diverse industries.

SPEAKER BIOGRAPHIES



Fardan Ali
Vice President, Wealth Strategy & Advisor Enablement
Designed Wealth Management

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



Venelina Arduini
Co-Leader, Alternative Investments Canada
Mercer

Venelina works with clients to build and maintain their alternatives portfolios, helping them with portfolio construction and manager selection. She joined Mercer in 2011. Venelina is also a Board of Director member for the West Park Hospital Foundation based in Toronto. Venelina holds an MBA from Ivey Business School. She also earned the CFA and CAIA designations.



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.

SPEAKER BIOGRAPHIES



Josh Booth
Partner
Dawson Partners

Josh Booth is a Partner at Dawson, a global alternative asset manager focused on providing structured solutions to private markets. Josh joined Dawson in 2019 and has 13 years of private equity and investment banking experience. Prior to joining Dawson, Josh worked as a Principal and senior member of the Funds investment team at CPPIB in Toronto and London, UK. Josh was primarily responsible for sourcing, executing and monitoring private equity fund investments and managing several of CPPIB's largest GP relationships. In addition, Josh represented CPPIB on several limited partner advisory boards in North America, South America and Europe and was also a member of the Funds, Secondaries and Private Equity Asia investment committees for CPPIB. Josh began his career in investment banking at Paradigm Capital. Josh holds a Bachelor of Arts (Honours) in Economics from Queen's University and is a CFA® charterholder.



Daniel Cohen
Head of Canada, GWS
EQT Group

Daniel is Head of Canada, Capital Formation. Daniel also works closely with the wider Investor Relations team to help grow the distribution capabilities to institutional investors across Canada.

Before joining Coller Capital, Daniel was Head of Investor Relations at Fiera Comox, a global investment management firm with investments in Private Equity, Private Credit and Natural Capital (Agriculture and Timberland). Daniel was responsible for the investor relations program for institutional and private wealth investors, globally. Daniel began his career as a corporate lawyer at Stikeman Elliott LLP, where he practiced primarily in the areas of mergers and acquisitions, securities, and corporate law, with a focus on cross border private equity transactions.

Read more at caasa.ca - or contact us at +1 (647) 953-0737 or paul@caasa.ca

SPEAKER BIOGRAPHIES



Jean-François (J-F) Démoré
Founder, Managing Partner and Chief Investment Officer
Innova Wealth Partners

Jean-François (J-F) Démoré, CIM, CFP, MBA, is the Founder, Managing Partner and Chief Investment Officer of Innova Wealth Partners, an independent wealth management firm overseeing more than $900 million in client assets. While leading one of Northern Ontario's rapidly growing wealth management firms, J-F remains very much "in the trenches" as a practicing advisor, working directly with families, professionals and business owners. He also oversees nearly $500 million invested through Innova's proprietary investment pools, which have made extensive use of alternative investment strategies since 2019. This gives him a unique perspective as both an allocator and the advisor ultimately responsible for explaining portfolio decisions, liquidity, risk and outcomes directly to clients.

J-F's background also bridges finance and technology. He holds an Honours degree in Commerce and Computer Science, has been actively involved in the development of software and application of AI within financial services, and was a founding member and later Co-Chair of the Advocis Technology Task Force. He also consulted with one of North America's most active angel investment organizations by deal flow, which gave him a keen understanding of the venture capital and private equity landscape.

His entrepreneurial and industry contributions have been recognized with RelèveON's Young Entrepreneur of the Year award and Northern Ontario Business' 40 Under Forty. J-F also holds an MBA, for which his graduate research focused on tactical asset allocation.



Ralph Desando
Deputy CEO – Alternative Investments
Yorkville Asset Management

Ralph Desando, Deputy CEO – Alternative Investments at Yorkville Asset Management has been with the company since its inception in 2010. He is responsible for leading Yorkville's strategic initiatives to provide clients access to investment opportunities in high quality Canadian healthcare companies. He has led the launch and growth of Yorkville's Health Care Fund into one of Canada's leading health care investment platforms. Since its launch, the Fund has grown to approximately $830M of assets under administration, growing Southbridge, CareRX and Back in Motion to become leaders in the Canadian healthcare industry.

Ralph's career in tax at Deloitte, completing the in-depth tax program from the Canadian Institute of Chartered Accountants (CICA), as well as assisting the institute with its tax program as a facilitator, has provided him with the background to develop efficient tax strategies, investment vehicles as well as the experience to assess value for investors. Ralph was an instructor at the University of Toronto's School of Continuing Studies in the area of credit and market risk management. He has also served as a member of the Board of Trustees of the Ontario Motor Vehicle Industry Council Compensation Fund, and as Chair of its Investment Committee. He is currently a member of the Southbridge Healthcare LP Board, a member of the CareRX Board, and Trustee of the Yorkville Health Care Fund.

SPEAKER BIOGRAPHIES



Constance Everson
Managing Director
Capital Markets Outlook Group, Inc.

Connie Everson is Managing Director of the economic & investment strategy consulting firm, Capital Markets Outlook Group (CMOG) in Boston, which she founded with a colleague in 1992. Connie is represented on the CFA Institute Speakers Bureau, and is a past- president of the Boston Economic Club. She serves on the investment committee of Mass PRIM, the pension fund for public employees in Massachusetts, and the Investment and audit committees of the Weredale Foundation in her native Montreal.



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.



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.

SPEAKER BIOGRAPHIES



David Manzano
Managing Director
Golub Capital

Mr. Manzano joined Golub Capital in 2020 and is a Managing Director on the Global Product Group within the Investor Partners Group. He is responsible for supporting business development and investor relations as a subject-matter expert for the Firm, strategies and products. Previously, Mr. Manzano was a Partner, Managing Director and co-head of the Senior Debt Business in the Private Debt group at AEA Investors, where he was responsible for managing a diverse portfolio of middle market club and syndicated leveraged loans. Prior to this position, he was a Principal and Portfolio Manager at Callidus Capital Management, where he managed several collateralized loan obligations. Prior to that, Mr. Manzano was an investment banker in the Leveraged Finance group at Merrill Lynch & Co. and began his career at The Chase Manhattan Bank. Mr. Manzano earned his BA in Government from Cornell University. He received an MBA in Finance from Columbia University.



Sean O'Hara
Co-Founder & Chief Investment Officer
Obsiido Alternative Investments Inc.

Mr. O'Hara is a senior investment executive with extensive private markets investment expertise, including due diligence, portfolio construction and risk management. He has over 30 years of investment experience in Europe and North America and has worked in the retail, private wealth, and institutional investment markets. Prior to co-founding Obsiido, Mr. O'Hara was the CIO at Cygnus Investment Partners, an alternative investment firm that provided proprietary Canadian access to the funds of Kohlberg Kravis Roberts & Co. (KKR), a leading global investment firm that manages multiple alternative asset classes, including private equity, private credit and real assets. Mr. O'Hara previously held positions at several leading investment organizations including Laketon Investment Management, Claymore Investments, Merrill Lynch Investment Managers and Rothschild Asset Management.

Mr. O'Hara holds the Chartered Alternative Investment Analyst (CAIA), Chartered Investment Manager (CIM) and Certified Financial Planner (CFP) 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.

SPEAKER BIOGRAPHIES



Shael Soberano
Chief Investment Officer
Sharno Group

Shael Soberano, CFA, is the Chief Investment Officer of Sharno Group, a privately owned independent principal investment group and family office focused on identifying strategic, value-add investment opportunities across a wide range of traditional and alternative asset classes and strategies.

Shael is also the President & CEO, Portfolio Manager & Chief Compliance Officer of Sharno Capital Corporation, a registered Investment Fund Manager, Portfolio Manager, and Exempt Market Dealer with the Ontario Securities Commission. Sharno Capital Corporation manages the Azalea Fund LP, a private investment fund focused on smaller capitalization public equities, utilizing a fundamental value and research-intensive approach.

Prior to the Sharno Group of Companies, Shael Soberano was Vice President, Senior Analyst at Vision Capital Corporation, a leading Toronto-based Hedge Fund manager focused on publicly traded real estate related securities. Shael first joined Vision Capital as an Analyst in 2009, shortly after its inception. He was promoted to Vice President, Senior Analyst in 2014, and was registered as an Advising Representative with the Ontario Securities Commission in 2017. With a wide range of roles spanning both business development and investment management initiatives, Shael's contributions were integral in growing Vision Capital's assets under management and contributed to its award-winning risk-adjusted performance over that period.

Shael is a CFA Charterholder and completed the Bachelor of Management and Organizational Studies Honours Degree with a Specialization in Finance at the University of Western Ontario. Shael completed the Partners, Directors, and Senior Officers (PDO) Course in 2019 and the Canadian Securities Course (CSC) in 2010, provided by the Canadian Securities Institute (CSI).

SPEAKER BIOGRAPHIES



Ryan Tomicic
Partner
Borden Ladner Gervais LLP

Ryan specializes in domestic and cross-border M&A, equity financing, investments, restructurings and private investment fund formation.

His role involves offering comprehensive business and legal advice to a diverse clientele, including global private equity funds, venture capital funds, private companies, publicly-traded companies, entrepreneurs, start-ups and investors.

Ryan's distinguished career is marked by his involvement in more than 200 transactions and over USD$10 billion in enterprise value, many of which featured non-Canadian parties or were associated with private equity funds or backed businesses. Ryan often advises on complex and highly strategic transaction matters and is highly sought after for strategic and advisory support. His multifaceted expertise positions him as a trusted advisor, providing valuable insights that contribute to the success of his clients' transactions, business operations and endeavours.

Ryan provides legal services through a Law Corporation.

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SPEAKER BIOGRAPHIES



Wilson Tow
Managing Partner
Altrust Investment Solutions

Wilson Tow is recognized as one of the most knowledgeable investment product design and product-compliance specialists in Canada. He has spent over 30 years working in wealth and asset management. As a Co-Founder and Managing Partner of Altrust, Mr. Tow advises on product structures, investment design, compliance, distribution requirements, and he works to educate investors on the benefits of alternative investment solutions.

Prior to co-founding Altrust Investment Solutions, Mr. Tow was Co-Founder and Managing Partner at Fern Capital Partners where he created and launched a unique alternative credit fund-of-funds mixing both private and public credit solutions. The novel structure offered retail investors access to assets traditionally available only to institutional investors.

Previously, Mr. Tow was Director of New Products and Complex Investments at Scotia Wealth where he oversaw the due diligence and approval process for all investment products offered on Scotia Wealth's product shelf. This included a broad range of instruments ranging from GICs to non-brokered private placements and prospectus-exempt securities. Under Mr. Tow's leadership, Scotia's alternative offerings grew meaningfully, helping investment advisors and investors structure more robust investment portfolios.

Prior to Scotia Wealth, Mr. Tow was Head of Product Research at Manulife Securities where he was responsible for formulating, designing, and implementing the firm's due diligence process.
Before moving to wealth management in 2006, Mr. Tow spent the previous twelve years in the asset management business, starting his career at Scudder Canada and its successor companies where he held senior roles in relationship management as well as product management and development. He also spent some time at Maple Financial where he was an analyst and allocator for its fund-of-hedge-funds product.

Mr. Tow is very active in the alternative asset industry in Canada and currently sits on the Member Advisory Panel of the Canadian Association of Alternative Strategies & Assets ("CAASA"). He also sits on the board of the Japanese Canadian Cultural Centre Foundation. Mr. Tow holds a Bachelor of Science degree from the University of Toronto, where he majored in Mathematics and Philosophy.

Read more at caasa.ca - or contact us at +1 (647) 953-0737 or paul@caasa.ca

SPEAKER BIOGRAPHIES



Laurence Vigeant-Langlois
Partner
AE Industrial Partners, LP

Dr. Vigeant-Langlois is a Partner at AE Industrial, with a primary focus on new business development and portfolio management across AE Industrial's funds in private equity and venture capital, where she serves on the Investment Committee of AE Ventures, and on AE Industrial's Origination Guiding and Responsible Investment Committees. She currently serves on the Boards of Directors of AEI portfolio companies: Alpine Air, Applied Composites, Columbia Helicopters and G.S. Precision, and on the Boards of Directors of AE Ventures portfolio companies: EVIO, FLYR, Gamma Alloys, Near Earth Autonomy and Revolution Space. She previously served on the board of Edge Autonomy prior to its sale to Redwire in 2025, and recently volunteered her time as a Senior Commercialization Advisor with DARPA, the Defense Advanced Research Projects Agency of the US Department of War focused on breakthrough technologies for national and economic security.

Prior to joining AE Industrial, Dr. Vigeant-Langlois worked for GE Aerospace as Chief Executive Officer of the GE Passport joint venture with Safran Aero Boosters (Belgium) and IHI (Japan), and as program management executive responsible for the GE Passport, CF34-3 and CF34-8C engines on Bombardier and Mitsubishi's aircraft. Previously at GE, Dr. Vigeant-Langlois joined the tiger team that founded GE Additive to transform industrial 3D printing, and led the strategy and global field marketing teams supporting the sale of GE Aviation's engines, systems and services across commercial, business and military aviation.

Before GE, Dr. Vigeant-Langlois led commercial, product and engineering teams in aerospace and high-tech industries. At Sikorsky Aircraft (Lockheed Martin), she launched new engineering innovation, ran defense offset programs and led the Operations Analysis and contract R&D teams. At aircraft lessor CIT (Avolon), she gained increasing responsibilities in acquiring $9B of aircraft and engines. At The Weather Company, she led the democratization of cockpit weather information and the launch of SiriusXM Aviation Weather. She also previously transported air freight flying Learjets across North America.

She received SM and PhD in Aeronautics and Astronautics from the Massachusetts Institute of Technology, a BEng in Mechanical Engineering from McGill University, is a graduate of the International Space University space studies program, UTC's Darden executive program, several GE Crotonville programs, the Program on Negotiation at Harvard Law School and completed the CFA Level 1. She is a certified FAA commercial pilot with Learjet privileges and a flight instructor in gliders. She also serves as Board Advisor to AI health tech company Triangulate Labs, and is a member of The Wings Club and PEWIN.

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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.

Canadian farmland: Among the most productive and sustainable on earth

- Climate Advantage
- Strategic Market Access
- Freshwater Abundance
- Sophisticated Agricultural Expertise

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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With land values historically moving in line with inflationary cycles.

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SPEAKER BIOGRAPHIES



Kent Willmore
Founder and CEO
Crescero Natural Capital

Kent Willmore is a seasoned agricultural entrepreneur and thought leader with over 30 years of hands-on experience in Canadian farmland operations, investment management, and sustainable land stewardship. As the Founder and CEO of Crescero Natural Capital, Kent leads one of Canada's most respected farmland asset management firms, headquartered in Chatham, Ontario.

Under his leadership, Crescero has launched and managed four farmland investment funds, each delivering strong, risk-adjusted returns while aligning the interests of investors and farm families. Kent's approach centers on a simple but powerful premise: restoring and managing natural capital is the key to unlocking both ecological resilience and long-term economic value.

He is the architect of Crescero's investment philosophy, which treats soil health, water access, and biodiversity not just as environmental goal posts but as core drivers of asset performance. Through proprietary diligence frameworks, infrastructure upgrades, and disciplined stewardship, Kent and his team improve farmland productivity while delivering scalable, institutional-grade outcomes for investors.

Kent holds a Bachelor of Environmental Studies and a Bachelor of Education from the University of Waterloo, where he was recognized as an All-Canadian Academic Athlete. He is an active member of the Canadian Association of Farm Advisors (CAFA) and the Ontario Federation of Agriculture.



Andy Yan
Principal & Portfolio Manager
Westcourt Solutions

As Principal & Portfolio Manager, Westcourt Solutions, Andy is responsible for the growth and development of Westcourt's partner firms. Andy is registered as a Dealing Representative.

Andy previously worked at a large alternative equities manager focusing on long/short strategies where he facilitated the national roll-out of two new alternative mutual funds (both liquid alts) across Canada's bank advisory and independent wealth management platforms. He was also responsible for covering institution clients and the due diligence/model portfolio teams within the bank advisory channels. With his deep knowledge of alternative investments, Andy advised his clients on the roles that these strategies play in a well-diversified client portfolio.

Andy earned a Bachelor of Mathematics degree from the University of Waterloo and is a Chartered Financial Analyst (CFA) Charterholder. He also completed the Canadian Securities Course (CSC) from the Canadian Securities Institute.

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