

CAASA
CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

CAASA'S 2026
CAASA ANNUAL CONFERENCE
Sponsorship 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.



2026 Platinum Sponsor

Offers your company the highest level of visibility and be exclusively showcased at each CAASA event we host in 2026. 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 2026 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).

2026 Gold Sponsors

2026 Gold Sponsors will be highlighted together at every conference and event, CAASA hosts in 2026. 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

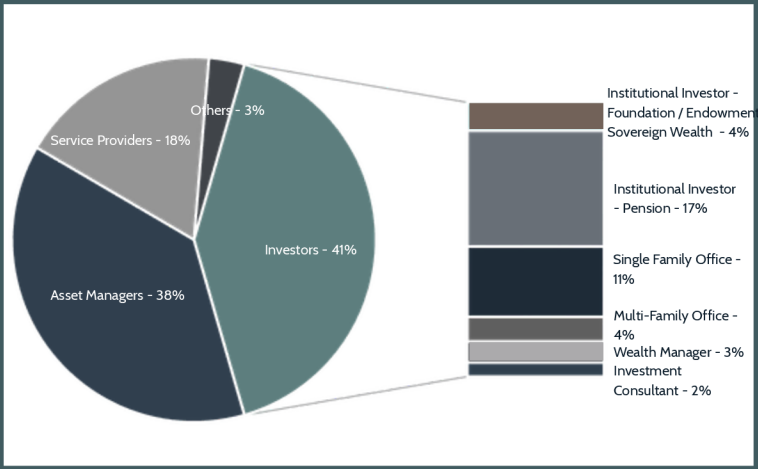
	Bronze	Silver	2026 Gold	Title	2026 Platinum
Complimentary Booth at all CAASA conferences attended					✓
Plantinum Sponsor banner at all 2026 CAASA events					✓
Gold Sponsor banner at all 2026 CAASA events			✓		
One Complimentary Title Sponsorship					✓
Discounted Title Sponsorship			25 - 50% Disc		25-50% 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 13)	✓	✓	✓	✓	✓
Complimentary additional sponsor item (page 14)	✓	✓	✓	✓	✓
Logo placement on the event page, marketing emails, and at the conference venue	✓	✓	✓	✓	✓
1/2 page advertisement in the printed conference program	✓	✓	✓	✓	✓

CAASA ANNUAL CONFERENCE 2026

NOVEMBER 3-4, 2026 - MONTRÉAL

OUR FLAGSHIP CONFERENCE BRINGS INSTITUTIONAL INVESTORS FROM ACROSS THE GLOBAL FOCUSING ON KEY ISSUES FACING INVESTORS AND MANAGERS IN CANADA AND ELSEWHERE INCL. STRUCTURING, LEGAL & TAX ISSUES, IT & OPERATIONAL AREAS, & INVESTMENTS

	Pricing
Bronze Sponsor	$3,500
Silver Sponsor	$5,000
Title Sponsor	$20,000 $15,000 for 2026 Gold Sponsors Complimentary for 2026 Platinum Sponsor



click here for the 2025 delegate list

DELEGATE REGISTRATION FEES

Price increases by $250 on October 5th, 2026 | Additional price increase of $250 on October 27th, 2026

Single Family Offices (including non-members)	**Complimentary**
Investment Advisors	**Complimentary**
Intermediary Investor/Consultant +1	**$160**
Ancillary Service Provider	**$1,750** ($2,000 from October 5) ($2,250 from October 27)
Core Service Provider	**$2,750** ($3,000 from October 5) ($3,250 from October 27)

Asset Managers: <50 Million AUM	**$1,250** ($1,500 from October 5) ($1,750 from October 27)
Asset Managers: 50 - 500 Million AUM	**$1,750** ($2,000 from October 5) ($2,250 from October 27)
Asset Managers: 500 - 1,000 Million AUM	**$2,250** ($2,500 from October 5) ($2,750 from October 27)
Asset Managers: >1 Billion AUM	**$2,750** ($3,000 from October 5) ($3,250 from October 27)

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 2025 Program | View 2026 Event Page | View 2025 Event Page

3iQ · AGF | Capital Partners · Asset Management One · CapitalDirect · CFM · CIBC Mellon · iCapital · PREQIN a part of BlackRock · RBC Investor Services · Walton · Wilshire · Nasdaq · Omnigence Asset Management · SimCorp · Mercan Group · BMO Global Asset Management · Sage · skyservice

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):



- **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**

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.



Meals & Breaks



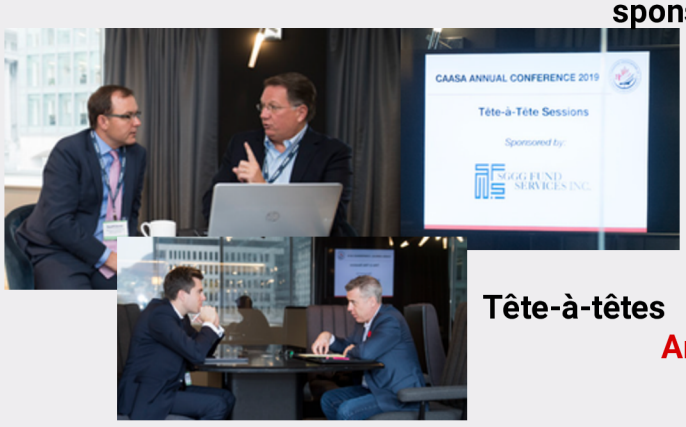
Lanyards (provided by sponsor)



Phone Chargers (stickers provided by sponsor)



Evening Reception



Tête-à-têtes

And More....

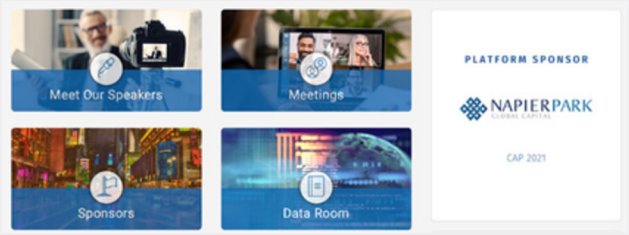
ENHANCED SPONSOR EXPOSURE ITEMS

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 the 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)



Booth ($2,000)



Program ($1,500)



Hotel key cards ($1,500+)



Fancy Coffee (~$3,000)

And More....

CAASA ANNUAL CONFERENCE 2025

DELEGATE LIST (1/2)

199 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 20 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 41% INVESTORS, 38% MANGERS, 18% SERVICE PROVIDERS

- 3iQ Corp.
- AE Industrial Partners, LP
- AGAWA Fund Management Inc.
- AGF Capital Partners
- AIMCo
- AllMind AI
- Altervest Ltd.
- AMF - Autorité des marchés financiers
- AQR Capital Management
- Arch Capital Group
- Ardian
- Area One Farms
- Arthur J. Gallagher
- Asset Management One USA
- Axonic Capital LLC
- BAC Securities
- Bank of Canada
- BCI
- BDO
- Bimcor
- BlackRock
- BMO Global Asset Management
- Bodhi Research Group
- BroadRiver Asset Management LP
- CAIA
- CanFirst Capital Management
- Capital Direct Management Ltd.
- Capital Fund Management (CFM)
- CIBC Mellon
- Citi Private Bank
- City Flats Asset Management
- Climate Finance Advisors
- CMI Financial Group
- CN Investment Division
- Cohen & Company Asset Management
- Concordia University
- Coriel Capital Inc.
- CPP Investments
- Cross Ocean Partners
- Crystalline Management Inc.
- Delbrook Capital
- Dicello Levitt LLP
- Duke Capital Limited
- Durum Capital Inc
- Electra Capital Advisors Ltd
- Evolution Credit Partners
- Evovest inc.
- Farm Credit Capital
- Financial Recovery Technologies
- Fondaction
- Forthlane Partners
- Forum Asset management
- Future Standard
- Healthcare of Ontario Pension Plan
- HEC Montreal Pension
- Hedgefacts International LLP
- HGC Investment Management Inc
- Hydro Québec
- Hydro-Quebec
- iCapital Network
- Innocap
- International Financial Data Services (IFDS)
- Investissement Quebec
- ITE Management
- Keystone Farmland Management
- Kruger Inc Pension

CAASA ANNUAL CONFERENCE 2025

DELEGATE LIST (2/2)

199 IN TOTAL AND THIS LIST DOES NOT INCLUDE ABOUT 20 SFO NAMES (WHICH WE DO NOT DISCLOSE) AS WELL AS A FEW OTHERS THAT CHOSE TO REMAIN PRIVATE. SOME INSTITUTIONAL INVESTORS SENT MULTIPLE DELEGATES. 41% INVESTORS, 38% MANGERS, 18% SERVICE PROVIDERS

- Kudu Investment Management
- La Caisse
- Lawrence River Capital
- LGT Capital Partners
- Lombard Odier
- Lucie and André Chagnon Foundation
- LuminArx
- MEMCO: Multilateral Endowment Management Company
- Mercan Group
- Mirae Asset Securities (USA) Inc.
- Morgan Stanley
- Nasdaq
- New Holland Capital, LLC
- New York State Nurses Association Pension Plan and Benefits Fund
- Northside Ventures
- Norton Rose Fulbright
- Nymbus Capital
- Oak House Advisers
- Ocree Capital
- Omnigence Asset Management
- Ontario Teachers' Pension Plan
- OPTrust
- P/E Investments
- PenderFund Capital Management
- Perth Advisors LLC
- PlusPlus Capital Management
- Preqin
- Prudential Financial
- PSP Investments
- RBC Investor Services
- Richardson Wealth
- Richter Family Office
- Royal London Asset Management
- Ruffer LLP
- Sage Software
- Sectoral
- SimCorp
- Skyservice Business Aviation
- SS&C Technologies Inc.
- Star Mountain Capital
- State of Wisconsin Investment Board
- TD Asset Management
- Tetrix
- The World Bank
- Theia Partners
- Tikehau Capital Canada
- Trans-Canada Capital
- UBC Investment Management
- Ullico Canada Marketing Services, Inc.
- University of Alberta
- University of Illinois Chicago
- University Pension Plan Ontario
- Wilshire
- YTM Capital Asset Management

Special Thanks to our 2025 Gold Partners



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

James Burron, CAIA
Co-Founder & Partner
james@caasa.ca
(647) 525-5174

Paul Koonar, CFA
Partner
paul@caasa.ca
(647) 953-0737 ext. 101

Suite 2500, 120 Adelaide Street West
Toronto, Ontario
M5H 1T1