CAASA
CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

CAASA'S 2027 SPONSOR GUIDE

Your member guide to value-added options for the coming year













ABOUT CAASA



INCLUSIVE, ACTIVE, & 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: at least five conferences are planned in 2025. 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 / crypto-assets, 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. While CAASA is not a capital introduction platform, we do create forums where investors and managers can meet organically or via structured meeting sessions, such as at this conference, 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.

Start-up Founders a category opened in Summer 2020, have a growing list of services and events tailored to their path to growth, including our Start-Up Round-Up held throughout the year.

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 significant allocations to alternatives, 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 back-drop that provides solace for investors as well as opportunities for managers. Of course, Canadian investors and managers are keen to learn of best practices in operations and portfolio management from their global peers.

OUR MEMBERSHIP

WE HAVE AN ALL-YEAR MEMBERSHIP DRIVE

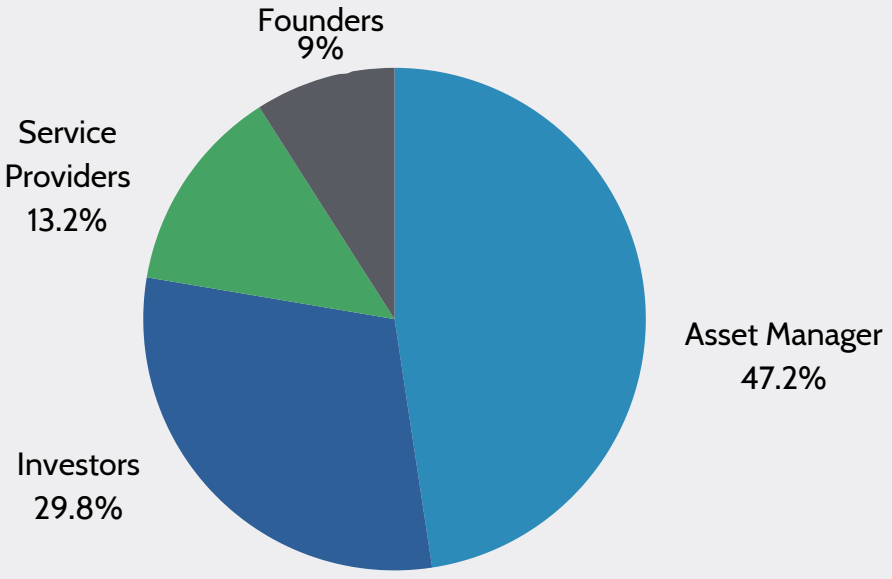
Over the last year we have exceeded our expectations for membership growth, which actually now stands at 295 members and with a fairly steady composition of ~30% investors, ~50% managers from all types of shops running many diverse alternative assets & strategies, and ~15% service providers - plus 34 start-up founders who may represent the next big companies in the world.



Our reach has increased over the last year or so as we stand at about 1 in ~4 members having no Canadian establishment (not even an employee or rep office stationed in the country) as many are seeing CAASA as their Canada play and making great use of our events and other initiatives to gain exposure to Canadian retail, HNW/family office, and/or institutional investors and/or asset managers. Of course, the prevalence of non-Canadian investors, especially family offices, pension plans, foundations & endowments, as well as sovereign wealth funds makes it more than just Canada that we are delivering to these managers

As we progress, we will be focused on Canada and our market but also live up to our motto of bringing Canada to the world and the world to Canada - and welcome more non-Canadian members of all types.

The benefit to all members is the value of this network that begets larger audiences and more diverse panels and events than any other.



Below are sponsorship costs, registration fees can be found throughout the booklet

SPONSORSHIP OPPORTUNITIES - 2027

Partnership Package Opportunities

PAGE 5 **CAASA 2027 GOLD PARTNER**
$30,000

Designed for members who wish to sponsor three of our conferences and receive prominent exposure at the conference and all in-person events (see banner to the left), first rights of benefits, and complimentary passes to in-person social events.

PAGE 6 **CAASA 2027 PLATINUM PARTNER**
$50,000

In addition to the Gold Partner benefits, our Platinum Partner will see their own independent banner at all conferences and in-person events, logo displayed on homepage of our the website, and highlighted independently on our conference event pages, discounted pricing, and much more!

Flagship Conferences

PAGE 9 **FAMILY OFFICE SUMMIT** | **TORONTO**
$3,500+ | *April 27-28, 2027*

An alternative conference designed for Single Family Offices, Multi-Family Offices, and Retail Advisors

PAGE 11 **FAMILY OFFICE SUMMIT** | **MONTREAL**
$3,500+ | *September 21-22, 2027*

An alternative conference designed for Single Family Offices, Multi-Family Offices, and Retail Advisors

PAGE 13 **CAASA ANNUAL CONFERENCE** | **MONTRÉAL**
$3,500+ | *November 2-3, 2027*

This conference brings institutional investors from across the globe focusing on key issues facing investors and managers in Canada and elsewhere.

Thematic Conferences

PAGE 10 **WEALTH MANAGERS' FORUM** | **TORONTO**
$2,500+ | *June 1, 2027*

All encompassing alternative conference designed for **Retail Advisors**

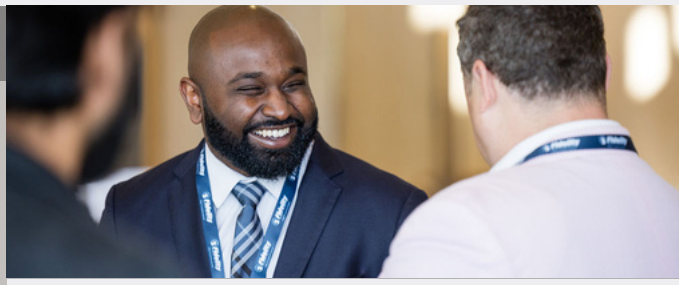
PAGE 12 **FAMILY OFFICE PERSPECTIVES YVR** | **VANCOUVER** - *October, 2027*
FAMILY OFFICE PERSPECTIVES YYC | **CALGARY** - *October, 2027*

These two west coast events focus on bringing together SFOs (principles and professionals), alongside industry partners that contribute to the growth of the ecosystem.

Other Opportunities

PAGE 17 **PAPERS / PRIMERS** | **MEMBERSHIP DIRECTORY**
$3,000+ | *$1000+*

CAASA 2027 GOLD PARTNER



Our 2027 Gold Partner package is designed for members who are active (or about to be!) and desire a more all-inclusive billing and offering experience. These members receive:

- Sponsorship & 3 delegate passes at any three of our conferences:
  - Wealth Managers' Forum (Toronto - June 1st, 2026)
  - Family Office Summit (Toronto - April 27-28, 2027) [Flagship]
  - Family Office Summit (Montreal - September 21-22, 2027)
  - CAASA Annual Conference (Montréal - November 2-3, 2027) [Flagship]
- $5,000 discount to be a conference Title Sponsor (Page 8)
- Branding at all conferences via Gold Partner banner
- Complimentary sponsorship & 3 passes for our numerous Networking Nights & Holiday Socials (value of $10,000+)
- Next call (in order of commitment date) on our additional exposure items (listed on page 14)
- Next call (in order of commitment date) on enhanced exposure items (listed on page 15) for the stated additional fees
- 10% off sponsorship of our CAASA papers and primers initiated in 2026

As is our tradition, we treat all members equally for our speaking opportunities and Gold Partners are afforded the same opportunity to speak on and moderate panels and participate in podcasts.

Cost is $30,000 (no taxes) per calendar year (no proration) in addition to annual membership dues.

Package valued at $40,000

Gold Partners are next in line (after our Platinum Partner) for spots at all of our in-person events in 2026 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees, but can be as few as 100 attendees) and we reserve at least 40% of tickets for investors (such as pensions and single family offices) leaving, at most, 150 tickets for our manager and service provider members which number more than 300 corporate entities. Gold Partners have a guaranteed three passes per chosen conference (non-transferrable between conferences).

Special Thanks to our 2026 Partners

2026 GOLD PARTNERS

3iQ · Asset Management One · CFM INSIGHT.DATA.CLARITY. · Crescero NATURAL CAPITAL · iCapital · LetkoBrosseau · Mass General Brigham · Wilshire

2026 PLATINUM PARTNER

CapitalDirect

CAASA 2027 PLATINUM PARTNER

Our 2027 Platinmum Partner package is meant for those who wish to get the most exposure possible from our audience. Not only will our Platinum Partner be featured prominently at all of our conferences, but will be highlighted independently on our website, and wherever a CAASA banner is present (globally!).

Our Platinum Partner will receive everything included for our Gold Partners plus:



- **Sponsorship and up to 3 passes for all CAASA Conferences**
- **Includes a Title Sponsor at a conference of their choosing & $5,000 discount on any additional Title Sponsorships**
- **Dedicated hero banner on our website (priceless)**
- **Includes Sponsorship and a Foursome at CAASA Golf Day**
- **Individual banner with only your logo at all in-person events, both within Canada & globally**
- **Booth at all in-person conferences ($14,000 value)**

As is our tradition, we treat all members equally for our speaking opportunities and our Platinum Partner is afforded the same opportunity to speak on and moderate panels and participate in podcasts.

Cost is $50,000 (no taxes) per calendar year (no proration) in addition to annual membership dues.

Package valued at $90,000



Our Platinum Partner is first in line for spots at all of our in-person events in 2026 which is important as we have strict venue capacity limits at these events (generally 200 - 250 attendees, but can be as few as 100 attendees) and we reserve at least 40% of tickets for investors (such as pensions and single family offices) leaving, at most, 150 tickets for our manager and service provider members which number more than 300 corporate entities. Our Platinum Partner has a guaranteed three passes per chosen conference (non-transferrable between conferences).

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 14 & 15 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 14 & 15 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 14 & 15 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 14 & 15 respectively).

SPONSORSHIP LEVELS

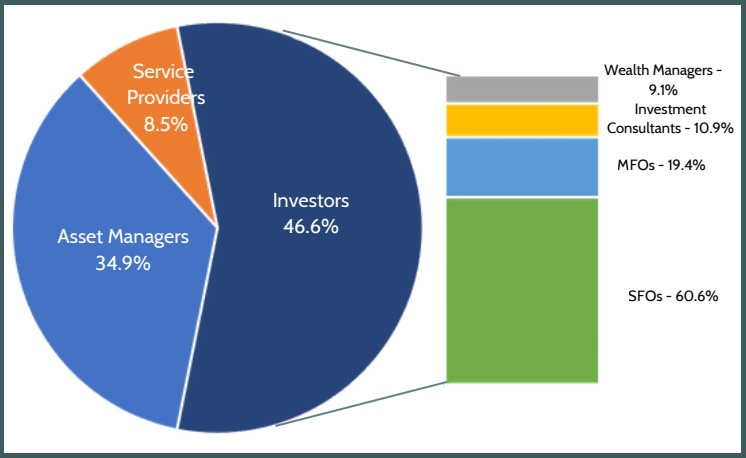
	Bronze	Silver	2027 Gold	Title	2027 Platinum
Complimentary Booth at all CAASA conferences attended					✓
Plantinum Sponsor banner at all 2027 CAASA events					✓
Gold Sponsor banner at all 2027 CAASA events			✓		
One Complimentary Title Sponsorship					✓
Discounted Title Sponsorship			25 - 50% Disc		25-50% 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	✓	✓	✓	✓	✓

FAMILY OFFICE SUMMIT 2027 - TORONTO

APRIL 27-28, 2027 - TORONTO

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

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



click here for the 2026 delegate list

DELEGATE TYPE	BEFORE Jan. 31, 2027	AS OF FEB 1, 2027 INCREASE OF $250	AS OF MAR 1, 2027 INCREASE OF $250	AS OF MAR. 30, 2027 INCREASE OF $250	AS OF APR. 20, 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	$1,750	$2,000	$2,250	$2,500	$2,750
Core Service Provider	$2,750	$3,000	$3,250	$3,500	$3,750
Asset Managers					
<50 Million AUM	$1,250	$1,500	$1,750	$2,000	$2,250
50 - 500 Million AUM	$1,750	$2,000	$2,250	$2,500	$2,750
500 - 1,000 Million AUM	$2,250	$2,500	$2,750	$3,000	$3,250
>1 Billion AUM	$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

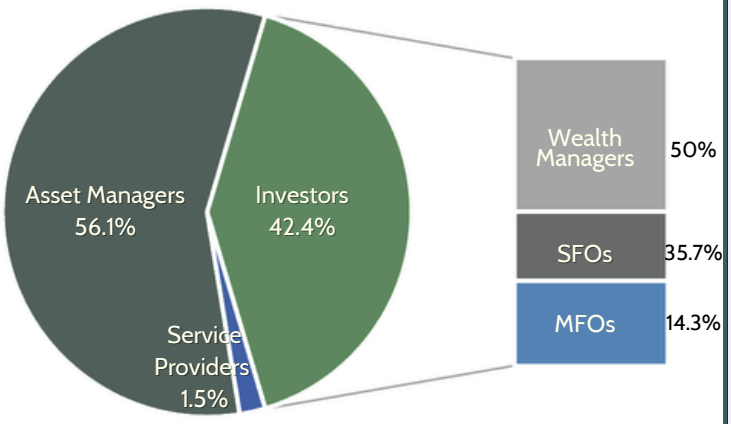
Thank you to our past Sponsors

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



click here for the 2026 delegate list

DELEGATE TYPE	Before JAN 31, 2027	AS OF FEB 1, 2027 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)	$1,000	$1,250	$1,500	$1,750	$2,000
Service Providers (CAASA Members)	$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

CapitalDirect | iCapital | LetkoBrosseau | Mass General Brigham | AllMind AI | OMNIGENCE ASSET MANAGEMENT

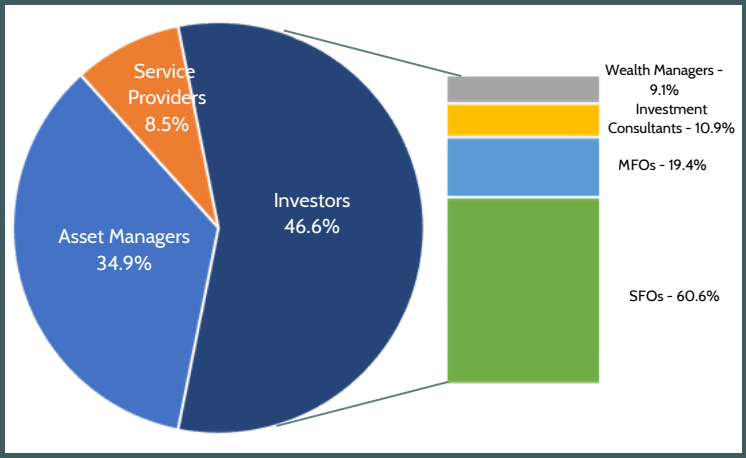
Thank you to our past Sponsors

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 AND 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 JAN 31, 2027	AS OF FEB. 1, 2027 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	$1,750	$2,000	$2,250	$2,500	$2,750
Core Service Provider	$2,750	$3,000	$3,250	$3,500	$3,750
Asset Managers					
<50 Million AUM	$1,250	$1,500	$1,750	$2,000	$2,250
50 - 500 Million AUM	$1,750	$2,000	$2,250	$2,500	$2,750
500 - 1,000 Million AUM	$2,250	$2,500	$2,750	$3,000	$3,250
>1 Billion AUM	$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

FAMILY OFFICE PERSPECTIVES YVR 2027

OCTOBER, 2027 - VANCOUVER

THIS AFTERNOON EVENT IS DESIGNED TO SHED SOME LIGHT ON THE FAMILY OFFICE MARKET – BOTH FOR THOSE WHO ARE WORKING WITH (OR ASPIRE TO) FAMILY OFFICES AND THOSE WHO ARE PART OF THESE ENTITIES (EITHER AS FAMILY MEMBERS/PRINCIPALS OR FULL TIME PROFESSIONAL STAFF).

DELEGATE REGISTRATION FEES



Investor	**Complimentary**
Members of CAASA **Asset Manager & Service Providers**	**TBA**
Non-Members **Asset Manager & Service Providers**	**TBA**

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

View 2026 Event Page View 2025 Event Page

FAMILY OFFICE PERSPECTIVES YYC 2027

OCTOBER, 2027 - CALGARY

THIS BREAKFAST BRIEFING INCLUDES A FIRESIDE WITH A PROMINENT SINGLE FAMILY OFFICE PLUS A PANEL (OF SFOS) DESIGNED TO GET FAMILIES AND THEIR ADVISORS UP TO SPEED ON WHERE THE 'INDUSTRY' AND THEIR PEERS ARE HEADED IN TERMS OF GOVERNANCE, INVESTMENT OPPORTUNITIES, FAMILY DYNAMICS, AND STRUCTURING AND TAX CONSIDERATIONS.

DELEGATE REGISTRATION FEES



Investor	**Complimentary**
Members of CAASA **Asset Manager & Service Providers**	**TBA**
Non-Members **Asset Manager & Service Providers**	**TBA**

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

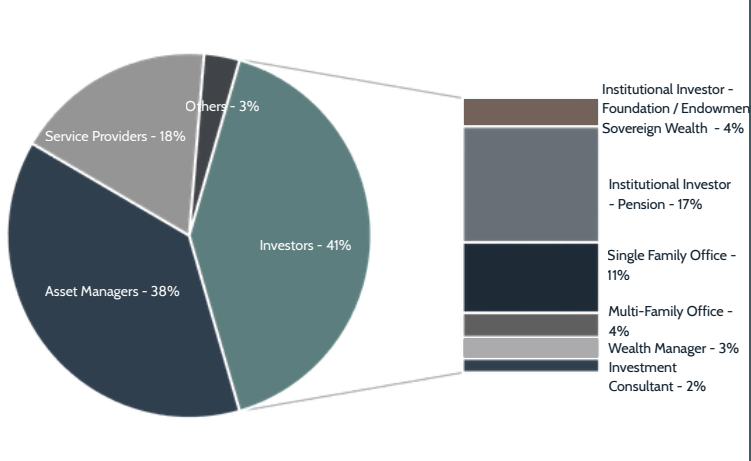
View 2026 Event Page View 2025 Event Page

CAASA ANNUAL CONFERENCE 2027

NOVEMBER 2-3, 2027 - 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 TYPE	BEFORE JAN 31, 2027	AS OF FEB. 1, 2027 INCREASE OF $250	AS OF SEPT. 2, 2027 INCREASE OF $250	AS OF OCT. 2, 2027 INCREASE OF $250	AS OF OCT. 26, 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	$1,750	$2,000	$2,250	$2,500	$2,750
Core Service Provider	$2,750	$3,000	$3,250	$3,500	$3,750
Asset Managers					
<50 Million AUM	$1,250	$1,500	$1,750	$2,000	$2,250
50 - 500 Million AUM	$1,750	$2,000	$2,250	$2,500	$2,750
500 - 1,000 Million AUM	$2,250	$2,500	$2,750	$3,000	$3,250
>1 Billion AUM	$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 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



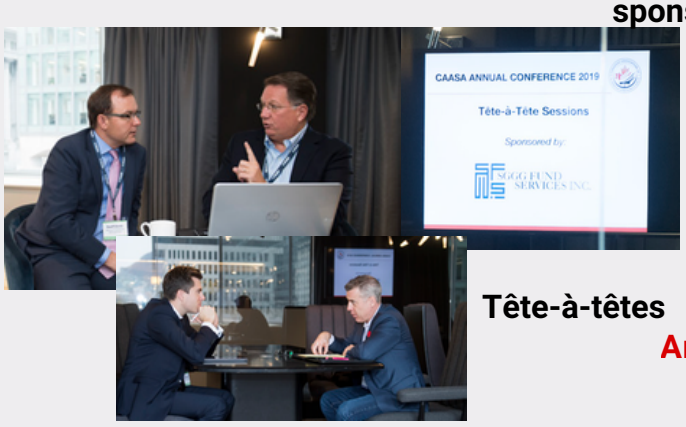
Lanyards (provided by sponsor)



Phone Chargers (stickers provided by sponsor)



Evening Reception



Tête-à-têtes

And More....

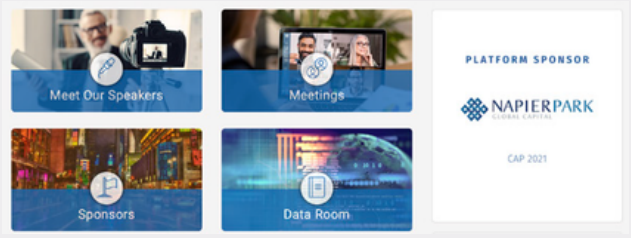
ENHANCED SPONSOR EXPOSURE ITEMS

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 NETWORKING NIGHTS

Sponsorship for Networking Nights is $1,000 or $5,000 for all 2026 Socials
Sponsorship includes 4 passes, logo placement on the event page and at the venue

Summer Networking Nights - Registration Fees	
Members of CAASA	$50
Non-Members of CAASA	$100

Toronto Holiday Social
Nov. 25, 2026

Montreal Holiday Social
Dec. 16, 2026

Special Thanks to our 2026 Gold Partners

2026 GOLD PARTNERS

3iQ · Asset Management One · CFM Insight.Data.Clarity. · Crescero Natural Capital · iCapital · LetkoBrosseau · Mass General Brigham · Wilshire

2026 PLATINUM PARTNER

CapitalDirect







CAASA PAPERS / PRIMERS

$3,000

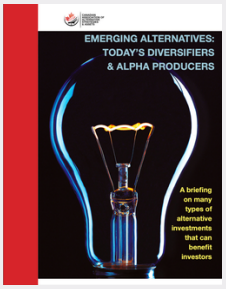
As you might recall – and possibly participated in – we have produced numerous CAASA Primers over the last 6 years. These were foundational pieces, meant to get readers up the curve in a variety of alternative areas of interest and we've had great reviews from participants and readers. Recent ones have been more thematic, which has allowed a more expansive narrative.

Distribution of soft copy on CAASA website, social media, email info packages to prospective members. Printing of 1,000 copies of to be distributed in info-packages at our 5-10 annual conferences + the 30+ that CAASA staff attend (and/or speak at) globally each year.











CAASA MEMBER DIRECTORY

Sponsorship Opportunities	
Full Page Advertisement	**$1,000**
Directory Sponsor Cover Page Logo and Full Back Cover Advertisement	**$5,000**

As you are likely aware, CAASA prints and distributes a program for each conference, complete with the agenda, speakers, sponsor advertisements and, until now, our member directory.

With our organizing two flagship conferences and seven one-day conferences each year, the membership directory is constantly changing (new members every week!), and the environmental impact of additional pages dedicated to the member directory for every conference, we decided to split the document.

Our conference programs will be supplemented by our bi-annual Member Directory: as of the end of March, before the Family Office Summit, and the end of October, before the CAASA Annual Conference.

All members will be displayed in the directory and this also brings an opportunity to those who want a larger presence and promote their offering for our members and the public with the option to have a full page advertisement or be the directory sponsor!

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

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

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% MANGERS, 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

CAASA ALTERNATIVE PERSPECTIVES 2025

DELEGATE LIST

122 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. 47% INVESTORS, 36% MANGERS, 17% SERVICE PROVIDERS

- 3iQ Corp.
- AGF Investments
- Aksia LLC
- Algoz
- Alphemy Capital
- Apex Fund Services
- AppGear Capital
- Area One Farms Ltd.
- Arxnovum Capital
- Avondale Private Capital
- Axonic Capital LLC
- Biricz Taylor Investments Ltd.
- BLG LLP
- BNQ Group
- Bodhi Research Group
- BroadRiver Asset Management LP
- Canaccord Genuity
- CanFirst Capital Management
- Capital Direct Management Ltd.
- Carte Wealth Management Inc
- CF Private Equity, Inc.
- CIBC Mellon Global Securities Services
- Cidel Asset Management
- CMCC Global
- CMHC - SCHL
- Coinbase
- Designed Securities Ltd.
- FutureSight
- Greybrook
- Guardian Capital LP
- Guardian Partners Inc.
- Hassan Family Office
- Highline BETA
- iCapital Network
- In-Q-Tel
- INKAS® Group of Companies
- International Financial Data Services
- KPMG
- Longridge Partners Inc.
- McCain Foods Limited
- McMillan LLP
- Nomos Capital
- North Horizon Holdings
- OMERS
- Omnigence Asset Management
- OTPP - Ontario Teachers' Pension Plan
- OZ Capital
- Partners Group
- PortfolioHiWay
- Preqin
- Prime Quadrant
- Raymond James Ltd
- reDeFi Capital
- RedJay Asset Management Inc.
- Richardson Wealth
- Richfox Capital Investment Management
- Richter Family Office
- Semper8
- Star Mountain Capital
- Steepe & Co. Ltd.
- StepStone Group
- Stonehage Fleming
- Tetrix
- Trans-Canada Capital Inc

CAASA ALTERNATIVE PERSPECTIVES 2025

DELEGATE LIST

104 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. 38% INVESTORS, 43% MANGERS, 18% SERVICE PROVIDERS

- Ullico Canada Marketing Services, Inc.
- University Pension Plan Ontario
- Virgo Digital Asset Management Inc.
- Walton Global
- Wellington-Altus Private Wealth
- Wilshire
- WonderFi
- Yardi Canada Ltd.
- Yorkville Asset Management

Special Thanks to our

2026 Platinum Partner

CapitalDirect®

2026 Gold Partners

3iQ

Asset Management One

CFM INSIGHT. DATA. CLARITY.

Crescero NATURAL CAPITAL

iCapital

LetkoBrosseau

Mass General Brigham

Wilshire

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

James Burron, CAIA
Founding Partner

Paul Koonar, CFA
Partner

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