

21st Annual

Foundation, Endowment & Not For Profit Investment Summit



SPONSORSHIP LEAD GENERATION GUIDE

The only Canadian event dedicated exclusively to foundation, endowment and not-for-profit investors

May 2-3, 2023



Build Valuable Relationships and Increase Your Assets Under Management

- The **21st Annual Foundation, Endowment and Not for Profit Investment Summit** is part of our suite of institutional investor conferences.
- This year's edition is an **in-person event** featuring face-to-face meetings, breakout streams and networking sessions. The summit will also be **streamed virtually** for increased reach and higher engagement.
- This exclusive conference attracts **150+ senior investors** actively looking for solutions to help protect and increase their capital.
- Our cutting-edge **event platform and app** enable you to schedule meetings onsite and network with our virtual audience.



Key Event Metrics



150+ qualified leads per event



Attendees with AUM ranging from **\$40M** to **\$5B**



81% of attendees are CIOs, Treasurers, VPs or Executive Directors



93% of attendees are located in Canada



Top Reasons Our Delegates Attend



Source new asset classes



Discover new asset managers



Gain best practices and investment strategies



Connect with current asset managers



Stay on top of investment trends and innovations



Engage with peers face to face and virtually

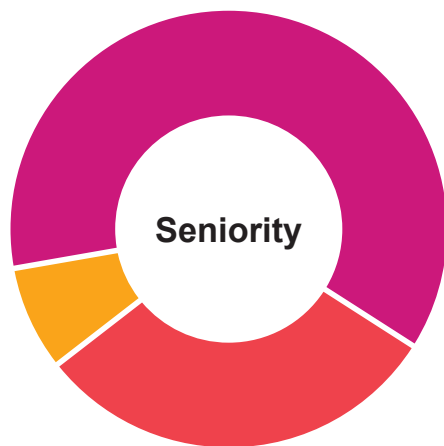


Meet thought leaders and visionaries

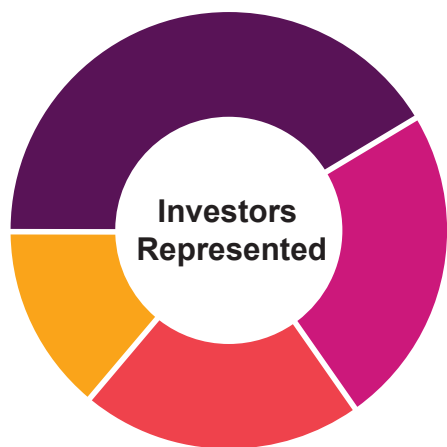


Network with industry stakeholders

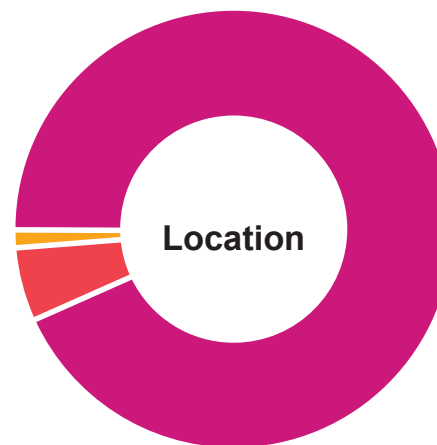
Partner with Senior Investors with AUM Ranging from \$40M to \$5B



- 61% CIO/Treasurer/VP/Board Member
- 31% Executive Director/Manager
- 8% Analyst



- 41% Foundation
- 23% Charity
- 20% Non-Profit
- 16% Endowment



- 93% Canada
- 6% United States
- 1% Other

How We Deliver Attendees

- FENI secures **world-class speakers** and produces **leading-edge content** to attract new investors to the summit and encourage past delegates to return.
- Our institutional investor community is made up of **5,000+** members, serving as one of the largest and most influential networks in Canada.
- Strategy Institute has established the reputation as a market leader with the **longest-running** institutional investment conference in Canada.
- Active in the institutional investor space **year-round**, we have our finger on the pulse of new trends and the sector's biggest players.
- We maximize engagement through a multichannel **targeted marketing campaign** to our institutional investor community, including social media, paid digital, thought leadership content, personalized emails, an event website and brochure.
- Having comprehensive COVID screening and protocols in place allow our sponsors, speakers and attendees to **network in a safe environment**.



SickKids®



Showcase Your Solutions Alongside Institutional Investment Leaders

Our FENI Summit attracts **40+ top industry speakers** at the forefront of their field.
Secure one of our sponsored speaking sessions and **establish your thought leadership** alongside these senior investors.



Jamie Hall
Chief Operating Officer

UHN Foundation



Tammy Moore
Chief Executive Officer

ALS Society of Canada



Jeffry Haber
Senior Director, Finance

The Commonwealth Fund



Dana Bezerra
President

The Heron Foundation



Kevin Goldthorp
President and Chief
Development Officer

SickKids Foundation



Joseph Mazon
Chair,
Investment Committee

Ducks Unlimited Canada



Jory Cohen
Director of Finance
and Impact Investment

Inspirit Foundation



Eric St-Pierre
Executive Director

Trottier Family Foundation



YOUR Sponsorship TAKEAWAY VALUE

1

Promote Your Thought Leadership

- Clients regard you as an **investment management leader** and a top asset manager.
- Stakeholders better understand the value and **credibility** of your brand and how to create a mutually beneficial partnership.
- Be known as the **go-to partner** for investment innovation with solutions for organizations that fit your ideal client profile.
- Market your on-demand speaking session and content to attract **new business**.

2

Generate High-Quality Institutional Investor Leads

- **150+ qualified leads** focused on your asset management brand.
- Meet face to face with **CIOs, Treasurers, VPs** and **Board Members** who are looking to leverage your expertise to meet their investment targets.
- Benefit from **increased audience engagement** with our gamification strategy and in-person engagement opportunities, including workshops, sponsored breakfasts, VIP dinners, icebreaker sessions and more.
- Utilize our **event platform** to schedule in-person and virtual meetings with senior investors to convert prospects into clients.



YOUR Sponsorship TAKEAWAY VALUE

3 Elevate Your Brand Awareness & Trust

- Maximize **visibility** and **recognition** among a tailored audience made up of your target accounts.
- Leverage a co-marketing campaign with **100,000+ brand impressions**.
- Increase your **AUM**, achieving your growth objectives.
- Raise your **brand profile** to stand out against the competition.

4 Build Relationships & Brand Loyalty

- Meet **new clients** and deepen existing relationships.
- Enable your business development representatives to engage with investors **in person** and **virtually**.
- Form **advantageous partnerships** for ongoing AUM growth.
- Cultivate connections with your **target audience** using cutting-edge tools to matchmake and set up meetings onsite.

LEVERAGE THE BEST OF BOTH WORLDS

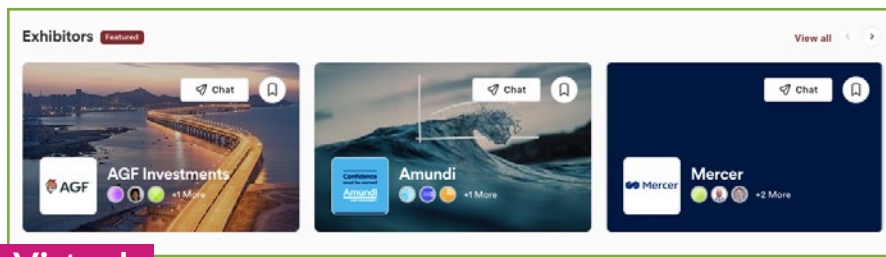
Benefit from an In-Person and Virtual Event

This hybrid experience is specially designed to help sponsors capture the most value possible!



In-Person

- Maximize your lead generation with access to a **larger audience** and a broader reach of attendees.
- Enhance your ability to meet with prospects through virtual networking **before, after** and **during** the conference on the event platform.
- Connect with clients **in person** and **virtually** through multiple avenues of **engagement**.
- Extend the reach of your thought leadership and boost lead capture with **on-demand speaking sessions** and downloadable content.
- Target your ideal clients with the help of matchmaking tools, **detailed attendee profiles** and filters.
- Double the impact of your brand awareness and recognition with both an **in-person** and **virtual exhibit booth**.



Virtual

GOLD Sponsorship Package

THOUGHT LEADERSHIP	LEAD GENERATION	BRAND AWARENESS	
<ul style="list-style-type: none"> • 30-minute in-person speaking session, including Q&A (also streamed live to our virtual audience) • Your speaking session and branded content will be available on-demand to establish yourself as an investment management leader 	<ul style="list-style-type: none"> • The complete delegate and speaker list emailed to you after the conference, including full contact information for follow-up • Extensive search capabilities and effective matchmaking tools to target senior delegates for in-person and virtual meetings • Event platform enables effortless lead capture before, during and after the summit to collect investor information 	<ul style="list-style-type: none"> • Comprehensive brand awareness campaign to 5,000+ institutional investment leaders, including social media, paid digital, personalized emails, an event website and brochure • Day of the event: Fully branded exhibit booths, onsite signage and prominent logo placement on all in-person and virtual event assets to market your brand and maximize reach • A scheduled co-marketing campaign and content syndication to provide maximum exposure, enabling your content to reach your target accounts 	
EXHIBIT BOOTHS	ANALYTICS & CLIENT INSIGHTS	ALL-ACCESS VIP PASSES	EXCLUSIVE CONFERENCE DISCOUNT
<ul style="list-style-type: none"> • Fully branded in-person exhibit booth that reflects your brand and its value proposition • Customizable virtual booth to feature additional brand information, downloadable content, video and image carousels, social media links, team member profiles, special offers and more 	<ul style="list-style-type: none"> • Real-time audience insights and engagement reports to help you connect with attendees who fit your ideal client profile • Key metrics detailing content, exhibit booth and session interaction • Personalized event post-mortem to calculate sponsorship ROI 	<ul style="list-style-type: none"> • 3 complimentary event passes, including one for your speaker 	<ul style="list-style-type: none"> • 25% discount on conference registrations for your guests and clients

*Silver and Bronze packages vary, please see next page

Sponsorship Packages at a Glance

	GOLD	SILVER	BRONZE	VIRTUAL
Thought Leadership	Premier 30-minute in-person speaking session	30-minute in-person panel discussion	×	×
Lead Generation	✓	✓	✓	✓
Brand Awareness	✓	✓	✓	✓
Exhibit Booth	In-person and virtual	In-person and virtual	In-person and virtual	Virtual
Analytics & Client Insights	✓	✓	✓	✓
All-Access VIP Passes	3 passes	3 passes	3 passes	3 passes
Exclusive Conference Discount	25%	25%	25%	25%

TESTIMONIALS

Delegates

“

Conference is a crucial “must attend event” for all who wish to stay at the leading forefront of innovation and information, to best benefit their foundations.



“

Great. A good spectrum of presentations – all relevant and important for endowments/investments of varying size.



Sponsors

“

The event went wonderfully! Our speaking session helped us showcase our solutions to the right audience. We had potential prospects reach out immediately after and ask to meet for more information. Some of these turned into opportunities, and we connected them with our sales rep before the end of the day!



“

I just wanted to thank you for being fantastic hosts of the conference ... You folks made our participation seamless.





Partner with an Industry Leader!

For over 25 years, Strategy Institute has facilitated long-term partnerships between institutional investors and asset managers.

- **20+ years** building relationships and credibility within the institutional investor space
- **Content leader:** Senior producers immersed in the fields they research in order to curate **innovative industry content**
- **Customer Success** program that provides white glove service to ensure you get the most value out of your sponsorship experience

Secure Your Spot Now

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We have a limited number of speaking opportunities and they sell out quickly! Connect with **150+ senior investors** looking for new asset classes and managers.



[Book a call](#) to learn how this opportunity can help you generate new leads and increase your pipeline!

Chee Vang
Sponsorship Manager

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