

21st Annual

Foundation, Endowment & Not For Profit Investment Summit

May 3-4, 2023

Old Mill, Toronto, Ontario.

**THE ONLY EVENT
SERIES DEDICATED
TO FOUNDATION AND
ENDOWMENT TRENDS
FOR THE INVESTMENT
COMMUNITY**



21th Annual

Foundation, Endowment & Not For Profit Investment Summit

YOUR MOST PRESSING INVESTMENT QUESTIONS ANSWERED

The 21st Annual Foundation, Endowment & Not for Profit Investment Summit returns to Toronto in 2023 with speakers from top North American organizations.

Get your ticket to join Canada's top foundation, endowments, not for profits and charitable organizations, including **City Central Foundation, National Public Pension Fund Association, Guelph Community Foundation, Inspirit Foundation and Environmental Defence.**

This year's edition is an **in-person event** featuring interactive sessions, curated breakout learning and face-to-face networking opportunities. The conference will also be **streamed virtually** for increased reach and higher engagement.

SECURE YOUR SPOT TODAY AND:

- ✓ Evaluate your asset class allocation to drive financial performance.
- ✓ Effectively prepare for the disbursement quota changes.
- ✓ Assess your investment portfolio ahead of the drive to net zero.
- ✓ Rethink your investment decisions through our dynamic event format.

Speakers include



JULIE SEGAL
Senior Program
Manager, Climate
Finance



JORY COHEN
Director of Finance and
Impact Investment



**BETH ANN
VALENTE**
Senior Finance Manager



**JENNIFER
JOHNSTONE**
President & CEO



MARK BLUMBERG
Partner



**GERALD ALAIN
P. CHEN-YOUNG**
CIO

Agenda Highlights

We have put together 2 invaluable days of insight and learning with session highlights including:



CREATE RESPONSE STRATEGIES TO MITIGATE THE RISKS SURROUNDING ECONOMIC UNCERTAINTIES

Investment markets will continue to face many uncertainties in 2022 and 2023. Overcome market volatility with the latest economic outlook. Source intelligence to:

- Anticipate the impact of interest rate changes on your portfolio
- Discover what economic uncertainties can mean for your program and mission
- Determine what needs to be done to protect your long-term investments

Overcome market volatility to protect your investments.

NAVIGATING THE TOP COMPLIANCE ISSUES FACING CANADIAN FOUNDATIONS

Foundations that are registered charities need to comply with corporate or trust law as well as Income Tax Act requirements. Prepare your organization for some of the most important compliance issues and developments facing foundations. Gain fresh insights into:

- Changes to the disbursement quota
- The increasing scrutiny of foundations and their transparency/payout rates
- Improving your compliance across a range of issues

Uncover solutions to the most pressing compliance issues facing foundations.



BALANCING CAPITAL PRESERVATION, MINIMUM DISBURSEMENT QUOTAS, LOW-RETURN ENVIRONMENTS AND INFLATIONARY RISKS

- When addressing asset allocation strategy, capital preservation in real terms is frequently discussed, but how often is it actually implemented?
- As Donor-Advised Funds (DAFs) continue to grow, how are the changing nature of inflows contributing to aggregate granting rates at the total fund level?
- How are nonprofit organizations responding to the need for continued real growth in their investment portfolios, while central banks normalize monetary policy in the face of the strongest inflation in decades?

Nonprofit organizations must respond prudently and efficiently to the evolving nature of DAFs. Deliver on your goals by proactively managing your investments in a high-risk environment.



Check out the full agenda



MaRS | CENTRE FOR
IMPACT INVESTING

greenchip
FINANCIAL

KITS FOR A CAUSE

JARISLOWSKY FRASER
GLOBAL INVESTMENT MANAGEMENT

AGF

Amundi
ASSET MANAGEMENT

BMO Bank of Montreal

Canadian Baptists
OF WESTERN CANADA

CIBC CIBC
World Markets

Cidel
Asset Management

The Commonwealth
Fund

AMPLIFY
CAPITAL

HEART & STROKE
FOUNDATION
OF CANADA
Finding answers. For life.

Who attends?

VG+
UBC
hospital
foundation

MARKHAM
STOUFFVILLE
HOSPITAL
CORPORATION

La Fondation
McConnell
Foundation

@preqin

PBI ACTUARIES &
CONSULTANTS

SickKids
FOUNDATION

TAF

Russell
Investments

UNIVERSITÉ DE
SHERBROOKE

MaRS
CatalystFund

LONDON
COMMUNITY
FOUNDATION

IMAGINE
CANADA

World Vision

THE LEONA M. AND HARRY B.
HELMSLEY
CHARITABLE TRUST

FONDATION
INSPIRIT
FOUNDATION

Holland Bloorview
Kids Rehabilitation Hospital

“

“The 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.”

Melanie Hall-Szyszkiewicz
Vice Chair, Central Okanagan
Foundation



“

“Excellent. I’ll definitely participate in future conferences.”

Jonathan Massel
Volunteer Treasurer, Louis Brier Jewish Aged
Foundation

“

“Great series of speakers that addressed a variety of good topics.”

Karin Bara
CMA , Controller, University Hospital
Foundation (Edmonton)

“

“Good speakers, well organized, well presented.”

E. Piro
Assistant Treasurer, McConnell
Foundation

“

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

Kamal Rasani
Nature Conservancy



“

“Overall, an excellent conference.”

David Leeson
Secretary, Investment Committee, Comm.
Foundation of Kingston and Area

Top 3 Reasons to Attend



Win over stakeholders to enhance portfolio performance as organizations transition to sustainable investments

- Rethink your asset classes and asset allocation to drive up long term financial performance.
- Preserve your organization's wealth in volatile times with a review of your financial strategies.

1

Benchmark your investment decisions with leading institutional investors

- Compare notes and discover which financial strategies drive better performance from your assets.
- Discover the range of asset allocation options to preserve your investments.
- Tap into real-life experience through a stimulating knowledge exchange among peers.



2



Grow your network by engaging with your peers across the foundation and endowment community

- Meet accomplished legal experts with the skills and expertise to provide timely advice.
- Build lasting relationships with the help of our onsite event app to schedule face-to-face meetings and networking sessions.
- If you can't attend in person, leverage our event platform to connect virtually.

3

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How to register

IN-PERSON PASS

FULL TWO-DAY ACCESS:

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables and one week of pre-event networking via our dedicated platform

FACE-TO-FACE NETWORKING:

Connect and build valuable relationships with our audience of thought leaders

5-STAR TREATMENT:

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location

EXPO HALL:

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

SPEAKER PRESENTATIONS:

Take home PowerPoints and white papers addressing your biggest challenges

ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event

VIRTUAL PASS

TWO-DAY LIVE STREAM ACCESS:

Tune into keynote sessions, panel discussions and case studies with real-time Q&A from the comfort of your home

VIRTUAL NETWORKING:

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool

VIRTUAL EXPO HALL:

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

SPEAKER PRESENTATIONS:

Take away PowerPoints and white papers addressing your biggest challenges

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**REGISTER
NOW**

Super early bird
(Ends January 27)

\$1,295

Early bird
(Ends February 28)

\$1,495

Regular Ticket

\$1,795

Super early bird
(Ends January 27)

\$895

Early bird
(Ends February 28)

\$995

Regular Ticket

\$1,395

VENDORS/ SUPPLIERS/ CONSULTANTS

Add value and showcase your expertise to **Food Safety Decision-Makers** looking to invest in impactful solutions

- Contact the Sponsorship Sales Team
- Reach out for more information with a 24-hour turnaround!
- Phone: 1-866-298-9343 x 214
- Email: foodsponsorship@strategyinstitute.com

GROUP RATES

To be eligible for group rates, delegates **MUST** register at the same time. The total discount per delegate (including applicable group discounts, etc.) **MUST** not exceed 25% of the regular conference cost.

For more information and to book your group passes, contact

Tommy Jones
Delegate Registration Manager
E: tommy@strategyinstitute.com