

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



**RACHEL VOLYNSKY**  
Chief Investment Officer



**BETH ANN  
VALENTE**  
Senior Finance Manager



**JENNIFER  
JOHNSTONE**  
President & CEO



**DAN LEVITT**  
Chief Executive Officer



**MARK BLUMBERG**  
Partner



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



**ANTHONY  
BATTISTA**  
Chief Financial Officer



**BRADFORD  
TURNER**  
Founder & Managing  
Director



**LORI NIKKEL**  
Chief Executive Officer



**BRI TRYPUC**  
Executive Director



**SEAN DUFF**  
Managing Director  
& Partner of  
Monroe Capital



**AARON WHITE**  
Vice-President,  
Sustainable Investments



**SARAH CHARTERS**  
Foundation President



# 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?

**VGH+  
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 Rajani  
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

21st Annual

# Foundation, Endowment & Not For Profit Investment Summit

May 3-4, 2023

Old Mill, Toronto, Ontario.

## 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

#### ON-DEMAND ACCESS:

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



**REGISTER NOW**

### 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](mailto: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](mailto:tommy@strategyinstitute.com)

Regular Ticket

\$1,795

Regular Ticket

\$1,395