22nd Annual

Foundation, Endowment & Not For Profit Investment Summit



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



Build Valuable Relationships and Increase Your Assets Under Management

- The 22nd Annual Foundation, Endowment and Not for Profit Investment Summit is part of our portfolio of institutional investor conferences.
- This edition is an in-person event featuring face-to-face meetings, breakout streams and networking sessions. The conference will also be streamed virtually for increased reach and higher engagement.
- FENI attracts **senior investors** actively looking for solutions to help protect and increase their capital.
- Our cutting-edge event app enables you to schedule meetings onsite and network with our virtual audience.



Key Event Metrics

Attendees with AUM ranging from \$50M to \$6B

83% of attendees are CIOs, Treasurers, VPs or Executive Directors

98% of attendees are from foundations, endowments, non-profits and charities 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

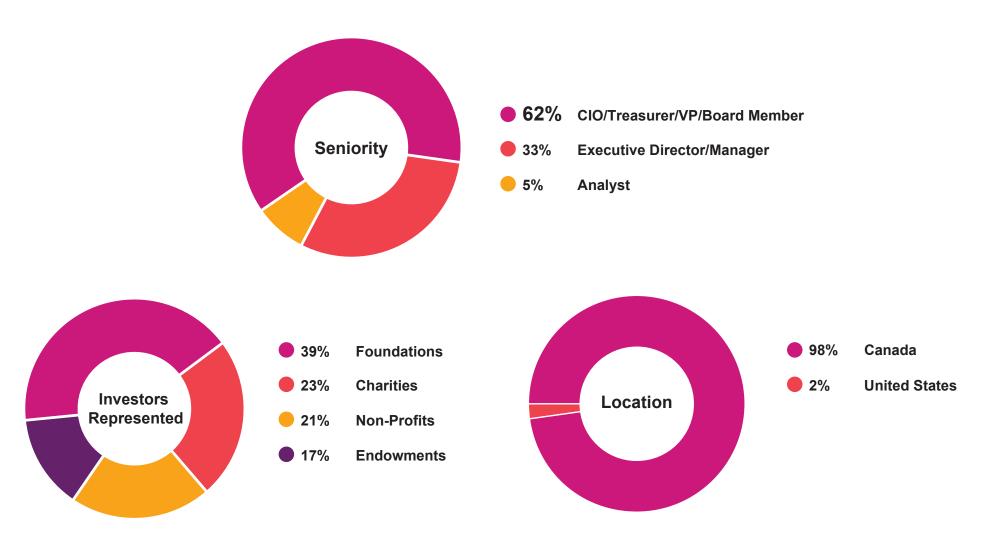
Stay on top of investment trends and innovations

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 \$50M to \$6B





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 results-driven delegate sales team is **dedicated to acquiring your top prospects**, target organizations and verticals.
- Attendees are vetted to prioritize seniority and relevance while capping sponsors to ensure the event remains unsaturated.
- 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.































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 & Chief
Development Officer

SickKids Foundation



Valerie McMurtry President & CEO

Children's Aid Foundation of Canada



Sarah Charters
President

United Church of Canada Foundation



Tim D'SouzaSenior VP, Finance &
Business Operations

Diabetes Canada



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

- Identify fresh prospects from your target accounts.
- 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 sponsored roundtables, workshops, breakfast briefings, VIP dinners, networking sessions and more.
- Utilize our event app to schedule in-person and virtual meetings with senior investors to convert prospects into clients.



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.

Your Sponsorship Packages



GOLD

- One of our most prestigious sponsorship opportunities with a **premium slot on the agenda** and **maximum exposure.**
- It features a **30-minute speaking session** as well as a fully branded in-person and virtual exhibit booth.
- The package also includes:
 - A comprehensive brand awareness and co-marketing campaign to 5,000+ institutional investment leaders
 - Your logo on all event signage and collateral, including the event brochure, website and marketing materials
 - Access to the complete delegate and speaker list
 - 3 VIP delegate passes for your team
 - 10 additional complimentary passes to invite your clients and prospects





SILVER

- The silver package provides the perfect opportunity to **demonstrate your brand's expertise on key themes important to the community.**
- It includes a speaking or moderating spot on a **30-minute panel** as well as a fully branded in-person and virtual exhibit booth.
- The package also includes:
 - A comprehensive brand awareness and co-marketing campaign to 5,000+ institutional investment leaders
 - Your logo on all event signage and collateral, including the event brochure, website and marketing materials
 - Access to the complete delegate and speaker list
 - 3 VIP delegate passes for your team
 - 10 additional complimentary passes to invite your clients and prospects

Your Sponsorship Packages



BRONZE

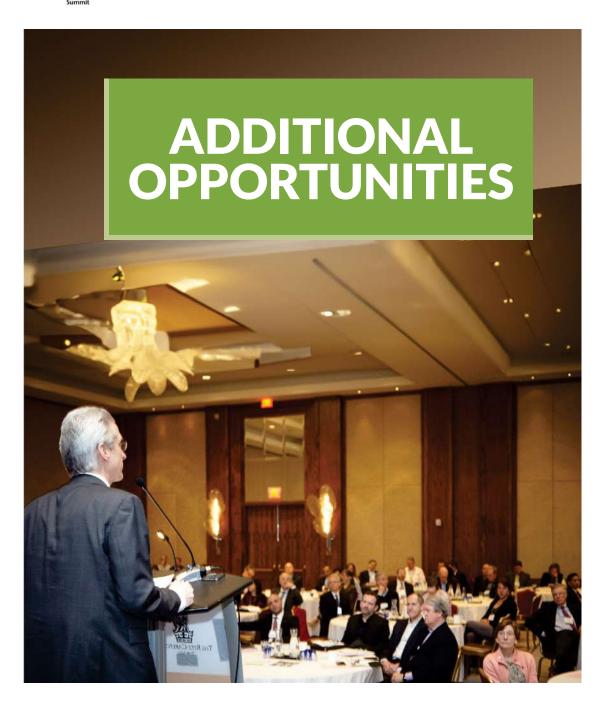
- Are your main sponsorship goals brand awareness and networking? The bronze package allows you to demonstrate your expertise and network with prospects face to face.
- You are provided with a prime booth location and access to all networking sessions onsite.
- The package also includes:
 - A fully customizable in-person and virtual exhibit booth
 - A comprehensive brand awareness and co-marketing campaign to 5,000+ institutional investment leaders
 - Your logo on all event signage and collateral, including the event brochure, website and marketing materials
 - Access to the complete delegate and speaker list
 - 2 VIP delegate passes for your team
 - 10 additional complimentary passes to invite your clients and prospects





NETWORKING

- As an entry-level sponsorship opportunity, **get a feel for the seniority and relevance of our institutional investor audience** with the chance to attend the event and leverage onsite branding.
- The package also includes:
 - 2 VIP delegate passes for your team
 - Your logo on all event signage and collateral, including the event brochure, website and marketing materials as well as promotion through a co-marketing campaign



TAILORED TO YOUR BUSINESS NEEDS

What better way to connect with potential prospects than through a host of engaging onsite activities or premier branding opportunities.



Roundtables



Conference Host



VIP Hosted Dinner



Lunch & Learn



Exclusive Evening Reception



Breakfast Briefing



Exclusive Lanyards



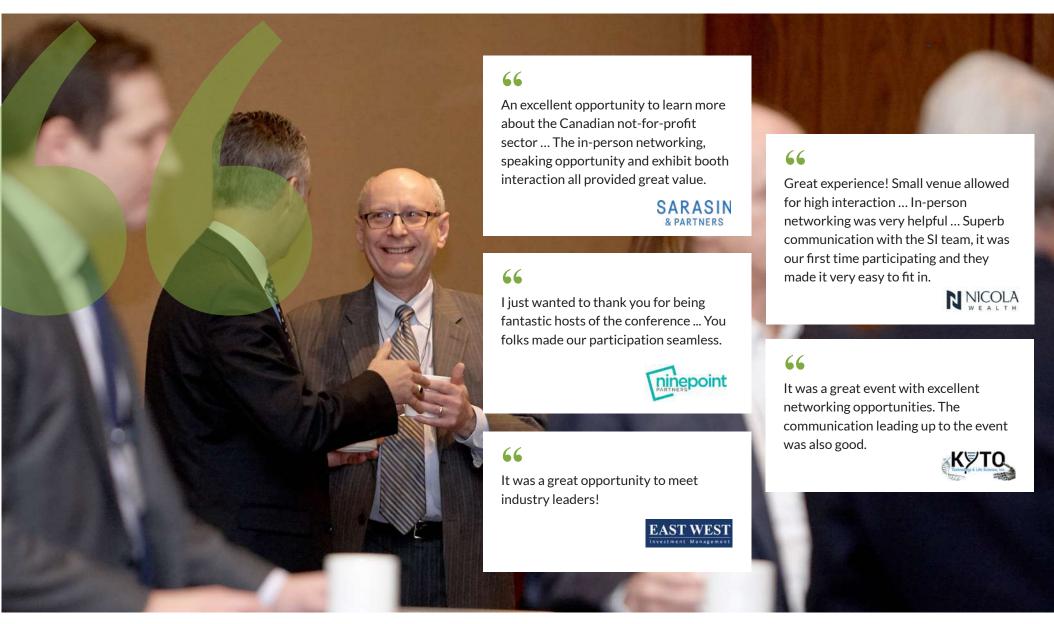
Wifi



Sponsorship Packages at a Glance

	GOLD	SILVER	BRONZE	NETWORKING
Thought Leadership	Premier 30-minute in-person speaking session	30-minute in-person panel discussion	×	X
Lead Generation	/	/	/	/
Brand Awareness	✓	✓	✓	✓
Exhibit Booth	In-person and virtual	In-person and virtual	In-person and virtual	X
All-Access VIP Passes for Your Team	3 passes	3 passes	2 passes	2 passes
Complimentary Passes for Your Guests	10 passes	10 passes	10 passes	×

SPONSOR TESTIMONIALS





Partner with an Industry Leader!

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

- 22+ 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 our community of **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

Call: 1-866-298-9343 x 214 chee@strategyinstitute.com