

22nd Annual

# Foundation, Endowment & Not For Profit Investment Summit

May 1-2, 2024

Hyatt Regency, Toronto, Ontario.

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



22nd Annual

# Foundation, Endowment & Not For Profit Investment Summit

## YOUR MOST PRESSING INVESTMENT QUESTIONS ANSWERED

The **22nd Annual Foundation, Endowment & Not for Profit Investment Summit** returns to Toronto in 2024, featuring speakers from top North American organizations.

Get your ticket to join Canada's top foundation, endowments, not for profits and charitable organizations, including **Juvenile Diabetes Research Foundation, Commonwealth Fund, Inspirit Foundation, Guelph Community Foundation YWCA Hamilton and The Atmospheric Fund Foundation for Environmental Stewardship** & more.

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:

- ✓ **Optimize your investment decisions** with the strategies you'll master at this dynamic event.
- ✓ Evaluate your asset class allocation to **drive financial performance**.
- ✓ **Get ahead of key regulation** around donor classification.
- ✓ Effectively prepare for the **disbursement quota changes**.
- ✓ **Take advantage of new ESG opportunities** and lead the new investment paradigm.

# Speaker Highlights

... AND MANY MORE!



**Jessica Diniz**  
CEO



**Beth Ann Valente**  
Director of Finance &  
Operations



**Jeffry Haber**  
Senior Director  
Finance



**JORY COHEN**  
Director of Finance and  
Impact Investment



**Donna Inch**  
Chief Financial Officer



**Kristian Knibutat**  
VP Impact Investing



**Julia Langer**  
CEO



**Heather Barkley**  
Campaign Officer



**Kat Cadungog**  
Executive Director



# Agenda Highlights

We have put together two 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 2023 and 2024. 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

““

*“Great event gave me lots to think about beyond just on investment strategies”*

United Church of Canada 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)

““

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

Louis Brier Jewish Aged Foundation

““

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

Central Okanagan Foundation



““

*“Overall, an excellent conference.”*

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



# AGENDA - DAY 1

Wednesday, May 1, 2024

## 7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **investing leaders**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, **discuss best practices** and prepare for the day ahead.

## 8:45 AM OPENING COMMENTS FROM YOUR HOST

Get an overview of today's sessions so you can get the most out of your conference experience.

## 9:00 AM OPENING KEYNOTE

### A Global Market Outlook for Investors: How to Spot Trends & Increase Returns

The markets have been volatile in the last few years and there are a lot of questions about inflation, the effects of COVID and a potential recession. You'll learn how to forecast these factors, so you can bolster your investing success over the coming year.

Take back to your office strategies to:

- Understand the impact of geopolitical events and how to adapt, so you can continue to make reliable returns.
- Master AI, Technology and Natural Capital to stay ahead of new industry trends.
- Reduce your exposure to a potential recession, saving time and money

*Optimize your ability to spot macroeconomic trends, so you can increase returns.*

## 9:30 AM C-SUITE PANEL

### C-Suite Panel: Master the Changing Donor & Regulatory Landscape to Amplify your Returns

There are a lot of regulatory changes happening in the industry, including changing cost structures and an evolving donor landscape. Face these challenges and amplify your ability to donate to your cause.

Develop a blueprint to:

- Optimize key strategies managing new cost structures and drive more money towards the bottom line.
- Adapt to donor classification changes while still driving donations to your cause.
- Improve your returns to increase your asset base and manage upcoming 5% disbursement quotas.

*Transform your donor & regulatory strategy to maximize returns.*

Jessica Diniz, CEO, *Juvenile Diabetes Research Foundation*

## 10:00 AM INDUSTRY EXPERT

### Defining the New Role of Impact & ESG To Win Big with This New Investment Paradigm.

Environmental, Social and Governance has become an important trend in our industry, but there are a lot of questions about what it means. Get a better understand of the impact of ESG, so you can supercharge your investment returns.

Get practical tips to:

- Understand what ESG means, how it's measured, and where it can provide you with reliable investment returns.
- Build a framework around impact, identifying where to change and how to invest to make that change.
- Optimize where you want to invest, so you can enjoy higher investment returns and a more robust management of risk.

*Heighten your understanding of investments newest and most exciting topic.*

## 10:30 AM SPEED NETWORKING! → MAKE MEANINGFUL CONNECTIONS

Grow your network by meeting like-minded individuals to share your latest ideas and projects. In this session, you will:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a fun, natural setting.
- Join a community of digital marketing experts and **gain invaluable support**.

## 10:40 AM EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE (20 MINUTES)

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

## 11:00 AM INDUSTRY EXPERT

### Disclosure Standards: Making Sense for Your Investments

There are so many disclosure standards when it comes to ESG that they are sometimes referred to as "alphabet soup." Get clarity on the framework that will work for you and your investments, so you can reliably integrate sustainability into your portfolio.

Adopt best practices to:

- Grasp which standards are more quantitative or qualitative, with use cases and examples for both.
- Move towards standardisation (such as the VRF or ISSB), so you can more easily compare the sustainability of investments and save time and resources.
- Gain deeper insights into sustainability and how it impacts your investments.

*Increase your investment analysis capabilities and your investment returns.*

Julia Langer, CEO, *The Atmospheric Fund*

## 11:30 AM PANEL

### The Return-to-Office: Retain & Improve your Talent Acquisition

Work is shifting, and no one is certain what the "return-to-office" will look like. In this session, you'll find out how to create an environment people want to turn to, manage benefits and secure the best talent so you can lead your foundation forward.

Create a roadmap to:

- Adapt to the benefits of a hybrid model, including attracting younger and more diverse talent.

# AGENDA - DAY 1

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- Transform your culture to one that will stick across virtual and physical locations.
- Become an organization where teams gel, so you can optimize your retention.

*Attract & keep excellent talent in your organization.*

## 12:00 PM INDUSTRY EXPERT WITH FOUNDATION

### Enterprise Risk Management: Building a Reliable Framework

Risk management is always at the forefront of investors' minds, with new approaches requiring the development of a formal program. Reduce your exposure to potential downturns, while reacting faster to developing situations.

Achieve a step-by-step action plan to:

- Enrich your understanding of different types of programs with a specific real-world case study.
- Integrate proactive, forward-looking risk management into your plans.
- Increase your reaction speed, so you can take advantage of new situations rapidly.

*Create your framework to react quickly while minimizing your chance of any losses.*

Mario Lavallée, Ph.D. CFA, Professor of finance, *Université de Sherbrooke*

## 12:30 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest industry issues**.
- **Expand your network** and make connections that will last beyond the conference.
- Enjoy great food and service while engaging with your **investing colleagues**.

## 1:30 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES (15 MINUTES)

- Browse through sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

## 1:45 PM INDUSTRY EXPERT

### Managing Uncertainty Guidelines: 5 Learnings for your Investment Committee

Markets are becoming more volatile than ever. Create a formalised approach to managing uncertainty, so you can ease resource constraints in both time and money.

Improve your ability to understand uncertainty, so you can increase your level of risk management. Master the success factors to:

- Enrich your understanding of uncertainty principles, so you can better manage risk.
- Optimize your asset allocation in a way that reduces the risk of unseen future events.
- Make new technology work for you, including Generative AI, data processing & more.

*Take-away practical risk management solutions your investment committee can use.*

Peter Muldowney, Senior VP, *CCL Group*

## TRACK 1

### 2:15 PM CASE STUDY

#### ESG & Legitimacy: Spot your Next ESG Opportunity & Avoid Pitfalls

Identifying a legitimate ESG opportunity is an essential skill in this new investment paradigm. Avoid greenwashing and spot legitimate opportunities.

Adopt best practices to:

- Cut through the noise to identify the data points that matter.
- Assess whether commitments are economically viable, and how they could be actualized.
- Develop a credible roadmap, with realistic targets around examples like GHG emissions or a net zero date.

*Enhance your investment strategy to take advantage of sustainable investing.*

Jory Cohen, Director Finance & Impact Investment, *Inspirit Foundation*

## TRACK 1

### 2:45 PM ASSET CLASS INDUSTRY EXPERT

#### Private Debt: How to Take Advantage of Fixed Income's Latest Trend

Private debt returns have increased alongside fixed income yields, but what is the best way to access these returns?

Transform the way debt works in your portfolio, so you can get reliable regular returns. Take away specific solutions to:

- Achieve double digit returns in the most lender friendly environment this century.
- Reduce your liabilities with high returns available in a low leverage environment.
- Optimize your ability to invest with

## TRACK 2

### 2:15 PM CASE STUDY

#### Dealing with CRA Changes: Reduce Your Regulatory Burden

The CRA is changing regulations around donors and accounting proposals are moving back to the deferral method. Investment committees must understand how these regulatory changes affect financial and labour resources.

Minimize your regulatory burden and ensure you don't fall afoul of new rules. Master the success factors to:

- Improving your understanding of changing accounting standards in 2025.
- Recognizing why unqualified charities can expand your ability to receive donations.
- Adapting to new rules around donations on income statements, so you can understand how it affects your donations.

*Reduce your regulatory burden & stay on the right side of regulators.*

## TRACK 2

### 2:45 PM ASSET CLASS INDUSTRY EXPERT

#### Investing in Infrastructure: Enhance Your Mission-Lead, Long Term Investments

Infrastructure is a big contributor to mission-lead investments, but they can be unfamiliar to lots of investors. Deepen your understanding of infrastructure, so you can contribute to society's greatest challenges. Take back to your office strategies to:

- Invest in green infrastructure, such as EV charging or renewable energy.
- Reduce your stock market correlation, so you can enjoy a strong and viable hedging strategy.
- Bolster your protection against illiquidity,



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lower documentation requirements.

*Perfect your private debt strategy for significantly increased returns.*

unlocking higher returns.

*Amplify your mission's impact while increasing your returns.*

## 3:15 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of digital marketing innovation firsthand.
- Meet one-on-one with leading solution providers to **overcome organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

### TRACK 1

#### 3:45 PM ASSET CLASS INDUSTRY EXPERT

##### Private Equity Headwinds: A Set up for Your Next Investment?

Private Equity could be suffering some headwinds, but experts say it's more resilient than you'd think. Improve your PE investment strategy, taking advantage of lower prices now to make big returns in the future. Source practical tips to:

- Take advantage of the lull in valuations, snapping up profitable companies at lower prices.
- Excel at buying companies who are cost-saving and budget-tightening.
- Amplify your returns in the medium term with effective ESG analysis of PE.

*Impact your returns in what is now a buyers' market.*

### TRACK 2

#### 3:45 PM ASSET CLASS INDUSTRY EXPERT

##### Asset Class Split: Why Your 60/40 Split Needs to Change

Economic outlook gives the classic 60/40 split at 7% return, but with the inclusion of different asset classes, this could increase to 12%. Optimize your asset class split to maximize your returns, while keeping your risk low. Develop a blueprint to:

- Impact your returns positively but including new asset classes, including farmland, real estate & more.
- Amplify your ability to affect your mission, by giving you greater investing scope.
- Reduce your risk levels to traditional investment options, by diversifying elsewhere.

*Diversify your asset split to positively impact returns and risk management.*

## 4:15 PM CASE STUDY

### The Changing Face of Investment Committee Volunteerism

#### Keeping your volunteers engaged during harder economic conditions

Volunteers are essential to not-for-profit investors, especially those who can help on the investment committee, but as inflation soars, their time becomes less available. Adapt to the changing volunteer climate, learning how to attract and keep them engaged. Source practical tips to:

- Enrich the volunteers' experience by giving them real decision-making input on investments.
- Reduce your reliance on them for administrative tasks through the use of technology.
- Impact your volunteers' conscience through educating why financial decisions can make a real difference.

*Retain your volunteer labour force who will reduce your resource consumption.*

**Donna Inch**, Chief Financial Officer, *Holland Bloorview Kids Rehabilitation Hospital Foundation*

## 4:45 PM CLOSING KEYNOTE

### Convincing Your Donors to Fund Ongoing Programs: Selling the Basics

It's easy to sell a new piece of machinery or initiative, but convincing donors to get onside with ongoing, less 'exciting' things is paramount. Transform your donation strategy to steer donors in that direction to continue to get the most critical regular funds. Get practical take-aways to:

- Change donor perception about the more regular programs, increasing funding for them.
- Improve your expectation management, removing any difficult conversations at a later date.
- Advance your strategy to include fundraisers, helping to ringfence donations from the initial conversation.

*Gain the donations you need to fund your most critical programs.*

**Heather Barkley**, Campaign Officer, *YWCA Hamilton*

## 5:10 PM CLOSING COMMENTS FROM YOUR HOST

Review the key solutions and takeaways from today's sessions. Source a summary of action points to implement in your work. Prepare for tomorrow's highlights!

## 5:15 PM EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC & NETWORKING

- **Relax and unwind** with tasty cocktails after a long day of learning.
- Don't miss your chance to win fun prizes at our **Reception Gift Giveaway**.
- Make dinner plans with your **new connections** and explore the best of what Toronto nightlife has to offer. Just be sure to set your alarm for Day 2!

## 6:15 PM CONFERENCE ADJOURNS TO DAY TWO

# AGENDA - DAY 2

Thursday, May 2, 2024

## 7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **investing leaders**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, **discuss best practices** and prepare for the day ahead.

## 8:25 AM OPENING COMMENTS FROM YOUR HOST

Get a glimpse into today's sessions so you can get the most out of your conference experience.

## 8:30 AM OPENING KEYNOTE

### Developing Policy & Strategic Plans: How to Find your Next High-Growth Investment Opportunity

Develop a strategic plan with a supporting policy to formalize your investment process. Perfect your plans to find high growth opportunities and invest while using less resources. Create a roadmap to:

- See gaps in your capacity and knowledge and how you can use volunteers to reduce resource consumption.
- Increase your standardization, so you can easily define and achieve your goals.
- Align your investment process to your mission values.

*Enhance your policy standardization, reducing resource consumption and improving investment success.*

## 9:00 AM C-SUITE PANEL

### Understanding The Future of Your Investment Style: What Questions Should You Be Asking?

With so many options to choose from, figuring out your investment strategy is more important than ever.

Heighten your ability to decide what is right for you, and what questions to ask to come to those decisions. Adopt best practices to:

- Perfect the questions you need to ask, to understand if you should have full or partial OCIO.
- Improve your understanding of what an RIA can offer you, and how it differs from dealing with asset managers.
- Optimize your strategy and management split, maximizing your ROI on your investment style.

*Achieve the optimal management style by asking the right questions.*

## 9:30 AM INDUSTRY EXPERT

### Revolutionize your ESG Strategy: Invest Dirty to get Clean

Companies that tend to score best on sustainability, are often not the ones that need to change. Achieve real ESG results by investing in 'dirty' companies, turning them around and making real impact. Walk away with an action plan to:

- Adapt to investing in companies that are typically less sustainable, so you can make better returns in the future.
- Amplify your sustainability impact by turning around less sustainable companies.
- Reduce performative investing by avoiding investing in companies that don't need to change.

*Increase your sustainable impact and make investment-grade returns.*

**Kristian Knibutat**, VP Impact Investing, *The Atmospheric Fund*

## 10:00 AM ROUNDTABLES → MAKE MEANINGFUL CONNECTIONS (15 MINUTES)

### Roundtable 1: Aum Under \$100M

Meet with your peers, to understand how to mitigate the unique challenges you face, such as labour shortages, resource allocation, building governance and frameworks, due diligence and more.

- Labour shortages: How to do more with less people.
- Resource constraints: Navigate financial markets and keep costs down.
- Frameworks: Build structured plans to help reduce due diligence needed.

### Roundtable 2: AUM \$100M-1bn

As foundations get larger, more engagement between your managers, OCIO's, RIA's and investment committee is essential to ensuring that the correct work of due diligence and risk management is carried out effectively. Come together with your colleagues to collaborate on exactly how to solve these issues.

- Regulatory Compliance: Assess the new disbursement quotas.
- Investment styles: Dissect in-house vs OCIO set-ups.
- ESG Investing: Review the extent of new sustainable investment trends.

### Roundtable 3: AUM \$1bn+

As larger foundations become more established with their investment committees and staff, they need a more sophisticated understanding of investment. Grasp the nature of each asset class, so they can contribute to your investment success as a foundation.

- Asset Allocation: Stress test each asset class and your total portfolio.
- Wealth Preservation: Inflation proof your investments.
- Risk Management: Identify previously hidden risks to protect your assets.

## 10:30 AM EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE (15 MINUTES)

- Browse different sponsor booths and **test drive new technology**.
- Take advantage of **event-specific offers** and special content.

## 11:00 AM INDUSTRY EXPERT

### Diversity, Equity, & Inclusion: Why It Should Matter to Your Investment Committee

Recent research has shown that diversity of thought and character in an organization has a positive impact on its commercial performance. Transform your approach to DEI so you can improve decision making. Develop a blueprint to:

# AGENDA - DAY 2

Thursday, May 2, 2024

- Master the intricacies of DEI and remove unseen risks like double counting.
- Identify how other charities are developing diversity frameworks to broaden their knowledge base amongst staff.
- Achieve clarity on what you want to measure, and how to measure it.

*Enrich your DEI strategy to ensure you are capturing every competitive edge.*

**Jeffrey Haber**, Senior Director, Finance, *Commonwealth Fund*

## 11:30 AM PANEL

### Reduce your Lag Time: Speed Up Your Investment Decision-Making

Volatile markets are making resourcing decisions difficult, with the dichotomy between financial and labour resources sharper than ever. Reduce your investment decision-making time by creating strong frameworks and acting on your fiduciary duty. Create a roadmap to:

- Draft real frameworks allowing you to define your strategy, to take advantage of deals when at optimal times.
- Master when to draft in help, to speed up deals and put your money to work.
- Cut down on wait times from your investment committee.

*Position yourself in the market to make quicker, better investment decisions.*

## 12:00 PM INDUSTRY EXPERT WITH FOUNDATION

### Increasing Who You Can Donate to With New CRA Legislation

New legislation at government level allows donations to be passed to non-recognised charities.

Amplify your ability to give to your cause by using this increased pool of potential recipients. Walk away with an action plan to:

- Increase your recipient network, so you can give to those doing the best work.
- Reduce the burden of new rules around grants, allowing you to donate more quickly.
- Adapt to new potential legal costs, so you can get a realistic picture of what they might be.

*Increase your recipient network to those who are doing the best work, encouraging more future donations.*

## 12:30 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest industry issues**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **digital marketing colleagues**.

## 1:30 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

## 1:45 PM LUNCHEON KEYNOTE

### Capturing Long Term Trends in Public Markets: How to Make Great Returns in The Most Popular Asset Class

As long-term investors, endowments and foundations have the ability to look beyond normal investment time horizons. This also allows them to take advantage of key trends, such as the rise of China.

Transform your public equity strategy by exposing yourself to longer term trends. Develop a blueprint to:

- Achieve higher returns by increasing your contact with technological and demographic changes in emerging markets.
- Increase your exposure by regularly reviewing managers and flexibility.
- Enrich your diversification by looking at global themes, so you can hedge risk while still proving strong returns.

*Amplify your returns by adapting your exposure to long term trends.*

## TRACK 1

### 2:15 PM ALIGNING INVESTMENT PRIORITIES: INDUSTRY EXPERT

#### Navigating New Trends: Tech and AI in Finance & How It Can Supercharge Your Investment Process.

It's no secret that tech & AI will play a huge role in investing. What will that role be, in the short, medium and long term? Conquer one of the industry's fastest growing trends and make a real difference to your due diligence. Adopt best practices to:

- Achieve real tech & AI adoption, identifying exactly where it can boost your productivity over the next year.
- Reveal how AI can drive portfolio valuation.
- Figure out where your money managers are using AI, to understand if a quantitative approach is right for you.

*Transform your investment process and increase returns.*

## TRACK 2

### 2:15 PM DEFINING IMPACT & ESG: INDUSTRY EXPERT

#### Cut Through the Noise: Effectively Valuing Your ESG Opportunities

Figuring out where you want to make an impact and how to measure that impact is the cornerstone of ESG. This can be complex, however.

Heighten your skill in legitimately valuing ESG opportunities by looking for the right metrics and disclosures. Master the success factors to:

- Perfect the types of disclosures you ask for, giving you a clearer picture of risks and opportunities.
- Bolster your understanding of what these key metrics tell you, including net-zero targets, GHG emissions and DEI targets.
- Improve on how these metrics then relate to your mission, allowing you to 'screen in' and proactively benefit society

*Achieve a full understanding of ESG investment opportunities.*

**Jeffrey Haber**, Senior Director, Finance, *Commonwealth Fund (Iona University for Marketing)*



# AGENDA - DAY 2

Thursday, May 2, 2024

## TRACK 1

2:45 PM

### ALIGNING INVESTMENT PRIORITIES: CASE STUDY

#### Mobilizing Your capital: Removing Barriers to Your Cause

Getting fund managers to focus on your investment area can sometimes be quite tricky, especially if it's niche, or there are barriers to entry for funding. Overcome these barriers and put your cause first, so you can increase funding in your area. Take away practical solutions to:

- Revolutionize your relationship with your fund manager to ensure your investment is going exactly where you want it to.
- Align your investment committee with your mission statement, removing room for confusion.
- Hear a case study on real estate and find out how to deal with technical and legislative barriers to sustainable buildings without harming returns.

*Produce innovation and impact, even in more difficult investment environments.*

3:15 PM

### EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of digital marketing innovation firsthand.
- Meet one-on-one with leading solution providers to **overcome organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

3:45 PM

### INDUSTRY EXPERT

#### Funding Your Programs: Managing Expectations for the Old and the New

Deliberate fundraising for individual programs has become essential. The key to fundraising success is managing expectations for both older and newer programs.

Transform your fundraising strategy to include steering committees and prospectus'. Gain key insights to:

- Achieve regular donations to both old and new programs.
- Improve communication with your recipients to allow you to sell the vision.

## TRACK 2

2:45 PM

### DEFINING IMPACT & ESG: CASE STUDY

#### EV Charging: A Shorter-Term Frontier for Your Investments?

As the world moves towards electric vehicles, the charging infrastructure that goes with it can provide generational returns. Optimize your exposure to this opportunity by listening to a deep dive case study on how it provides financial, societal, and environmental benefits. Hear take aways on how to:

- Perfect your sustainable investing strategy by capturing a huge investment opportunity.
- Improve your environmental & financial performance with an inevitable industry shift.
- Reduce your carbon exposure through identification of ethical, reliable EV charging providers.

*Hack your sustainable investing goals with a huge industry-wide movement.*

- Adapt to changing donor and recipient demands with more ease, with ringfenced funding.

*Increase and level funding across all your programs.*

4:15 PM

### CLOSING KEYNOTE

#### The Future of Advocacy: Tell Your Story to Bring Attention to Your Cause

The more eyeballs on your cause, the more donations and goodwill you'll receive. But how do you build that momentum?

Transform your advocacy by engaging in real story telling, using metrics and testimonials to increase attention. Develop a blueprint to:

- Excel at storytelling, bringing real world emotion and impact into the room, increasing the likelihood of donation.
- Bolster your storytelling with solid numerical arguments, including dollars saved, or life improvements.
- Master how to do this in front of the public, HNWI's, companies and government.

*Optimize your storytelling to significantly increase attention and donation amounts.*

4:45 PM

### CLOSING COMMENTS FROM YOUR HOST

Review the key solutions and takeaways from the conference. Source a summary of action points to implement in your work.

5:00 PM

### CONFERENCE ADJOURNS

22nd Annual

# Foundation, Endowment & Not For Profit Investment Summit

May 1-2, 2024

Hyatt Regency, 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**

### GROUP RATES

To check if you are eligible for a group rate, please contact:

**Tommy Jones**

Delegate Sales Manager

tommy@strategyinstitute.com

**Super Early Bird**  
Expires on January 26

**\$1,295**

**Super Early Bird**  
Expires on January 26

**\$895.00**

**Regular Ticket**

**\$1,795**

**Regular Ticket**

**\$1,395**

[www.foundationendowmentsummit.com](http://www.foundationendowmentsummit.com) - REGISTER NOW