

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 **York University, United Church of Canada Foundation, VHG & UBC Hospital Foundation, Juvenile Diabetes Research Foundation, St. Joseph Hospital Foundation, The Calgary Foundation, Commonwealth Fund (Iona University), Holland Bloorview Kids Rehabilitation Hospital Foundation, Université de Sherbrooke** & 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!



Arijit Banik
Treasurer
York University



Vani Visva
SVP Finance &
Operations
VGH & UBC Hospital
Foundation



Vijay Venkatesan
VP Finance & Operations
London Community
Foundation



Jessica Diniz
CEO
Juvenile Diabetes
Research Foundation



Wayne Douglas
Chief Operating Officer
St. Joseph Hospital
Foundation



Sarah Charters
President
United Church of
Canada Foundation



Eva Friesen
President & CEO
The Calgary
Foundation



William Scott
Managing Director
CPP Investments



Amanda Mayer
COO &
Program Director
The Lawson
Foundation



Jeffrey Haber
Senior Director Finance
Commonwealth Fund
(Iona University)



JORY COHEN
Director of Finance and
Impact Investment
Inspirit Foundation



Donna Inch
Chief Financial Officer
Holland Bloorview Kids
Rehabilitation Hospital
Foundation



Speaker Highlights

... AND MANY MORE!



Tracy Haynes
Investor Relations
Manager
The Atmospheric Fund



Julia Langer
CEO
The Atmospheric Fund



Heather Barkley
Campaign Officer
YWCA Hamilton



Timothy Kent
CO-Founder & CEO
Redwood Park
Communities



Rhonda Kent
Co-Founder & Interim Chief
Operations Officer / Director,
Housing & Supportive Community
Redwood Park Communities



Nick van der Velde
Finance Manager
Indwell



Kat Cadungog
Executive Director
Foundation for
Environmental
Stewardship



Krista Jones
CEO
Mars Discovery District



Leah Parry
Senior Manager
CleanTech &
Venture Services
Mars Discovery District



Jacqueline Ovens
Vice President
Investment Program
Foundation for
Equality Fund



Sarah Aves
Senior Institutional
Portfolio Manager
FieraCapital



Peter Muldowney
SVP
Head of Multi-Asset
Strategy
CC&L Financial Group

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



UHN
Toronto General
Toronto Western
Princess Margaret
Toronto Rehab
Michael Baylis Centre

THE UNITED CHURCH OF CANADA
FOUNDATION



UVIC

Canadian Baptists
OF WESTERN CANADA

VGH+
UBC hospital
foundation



The Commonwealth
Fund

SHN
SCARBOROUGH
HEALTH NETWORK

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

Who attends?

JIM PATTISON
CHILDREN'S HOSPITAL
FOUNDATION

MARKHAM
STOUFFVILLE
HOSPITAL
CORPORATION

La Fondation
McConnell
Foundation

@preqin

DAVID SUZUKI
FOUNDATION
One nature.

SickKids
FOUNDATION

TAF

MEDECINS SANS FRONTIERES
DOCTORS WITHOUT BORDERS

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)

“

“Good speakers, well organized, well presented. ”

E.Piro
Assistant Treasurer,
McConnell 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

Gain insight into today's sessions so you can get the most out of your conference experience and maximize your value.

9:00 AM OPENING KEYNOTE: BUILD A ROBUST ENDOWMENT PORTFOLIO

How To Build Management & Governance Structure to Enable Fastest Growing Assets

Transform your organization to one of the largest and fastest-growing community foundations with fastest growing assets by leaving a trail of growth, improvement, and strength. Create a roadmap to:

- Working in harmony with the chair and board to achieve long term objectives.
- Achieving impact and collaborative philanthropy
- Growing your endowment to more than half percent of what it currently is.

Maintain purchasing power of your foundation's main endowment by utilizing the expertise of external investment managers.

9:30 AM EXCLUSIVE C-SUITE PANEL KEYNOTE: IMPACT INVESTING

Institutional investors, particularly foundations, view impact investing as a way to align their organization's investments with their mission and values. However, concerns persist about how to invest to achieve positive impact without compromising the goal of maximizing asset values and the benefits for the organization. Create a blueprint on:

- How to approach impact investing in your own specific journey,
- Analysis of the types of opportunities available in the market and their implementation
- Assessment and measurement of their investments' success.

Make meaningful investments for a win-win goal.

Amanda Mayer, COO & Program Director, *The Lawson Foundation*
Sarah Aves, Senior Institutional Portfolio Manager, *Fiera Capital*

10:00 AM INDUSTRY EXPERT: ESG & NEW INVESTMENT PARADIGM

Define the New Role of Impact and 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 investment's newest and most exciting topic.

Sam Tripuraneni, Head of Sustainable Outcomes, *Aviva Investors*

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 **gain institutional investment expertise**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

11:00 AM CASE STUDY:

Aligning Financial Performance and Climate Impact

Julia Langer leads The Atmospheric Fund (TAF), a purpose-driven non-profit corporation with endowments from three levels of government that advances policies, programs and technologies to address climate change in the Greater Toronto & Hamilton Area. TAF has been a leader in impact investing for over 30 years, with a diversified portfolio that includes innovative financing to demonstrate and de-risk low-carbon investment opportunities. In this session Julia will share insights on:

- Working with Boards, Committees and staff teams to align financial and mission-focused performance
- Defining and setting investment objectives, risk-reward philosophy, and diversification approaches to ensure integrity in and impact from investment practices
- Specific strategies and examples of investments and how they can advance social, environmental and financial objectives

Julia Langer, CEO, *The Atmospheric Fund*

11:30 AM PANEL: OPTIMIZE YOUR PORTFOLIO WITH OCIO MODEL

How To Enhance Your Organization's Governance Oversight Better Reach Your Goals.

Delve in a live case study to explore how this model can help your organization enhance governance oversight and optimize your portfolio to better reach your goals.

- Uncover how you can maximize your resources to better deliver on the responsibility to your donors and beneficiaries

AGENDA - DAY 1

Wednesday, May 1, 2024

- Build knowledge and resiliency in the uncertain times of market volatility, inflation and investment complexity
- Better understand increasingly complex investment strategies, ranging from sustainable/impact investing to private markets, and their cost benefit dynamics

Partnership of investment governance, access and accountability that enables your organization to focus on your mission.

Wayne Douglas, Chief Operating Officer, *St. Joseph Hospital Foundation*
Tony Politano, SVP, Sr. Investment Officer, *Northern Trust Asset Management*
Alice Fang, President & CEO, *Northern Trust Asset Management* MODERATOR

12:00 PM CASE STUDY: RISK VS VOLATILITY IN DEBT INSTRUMENTS

Means For Investors Over Short Horizons and Long Ones

Private assets do not show the same price volatility as public ones, but this doesn't mean they are less risky. The industry practice of using volatility as a proxy for risk may have implications that we are not aware of. Create actionable plan for:

- Effective risk in private assets may be much higher than value variations over time might indicate.
- Risk could also be lower than price fluctuations if our investment horizon is sufficiently long.
- A good knowledge of an asset characteristics is essential to evaluate its risk. Past data is not enough

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

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 **gain institutional investment expertise**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

1:45 PM INDUSTRY EXPERT: INVESTMENT SUCCESS

How To Navigate Investment Success

Successful investment management and effective governance depend on well-defined and formal procedures. Overcome the challenge of regular processes that restrict a committees' ability to think more broadly. Create an action plan to:

- Choose potentially better solutions.
- Excel in navigating the decision-making process.
- Optimize your decision-making.

Take your investment oversight to next level with well revised practices.

Peter Muldowney, Senior VP, *CC&L Financial Group*

TRACK 1

2:15 PM CASE STUDY: ESG & LEGITIMACY

Spot your Next ESG Opportunity and 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 2

2:15 PM CASE STUDY: THE EQUALITY FUND

Activate, Disrupt and Sustain with Your 100% Gender-Aligned Investment Portfolio To Impact Goals

Draft your equality fund's investment strategy, ensuring alignment with feminist values and impact goals. Guarantee 100% gender alignment across asset classes by designing new and innovative gender lens investment products to mobilize new investors into the space. Take away actionable strategies to modify:

- Equality Fund's Investment Program
- Equality Fund's Intersectional Investment Guidelines and Gender Lens Investing Criteria
- Gender-lens investing market opportunity and value.
- Investment committee work approach on determining asset allocation and portfolio management strategy.

Create a unique model to activate investment alongside feminist philanthropy and high trust grant making to bring about long-term, sustainable, and powerful change.

Jacqueline Ovens, VP, Investment Program, *Equality Fund*

2:45 PM ASSET CLASS INDUSTRY EXPERT: PRIVATE DEBT

Impact Investing in the Energy Transition: Opportunities Beyond Renewables

In public equities, the energy transition presents unique and untapped investment opportunities that we believe can help solve for net zero while generating a positive impact and financial returns. While the focus in the past has been on renewables, an

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Wednesday, May 1, 2024

impact investing lens can uncover investment opportunities in areas like energy efficiency, decarbonization of heavy industries, data center optimization and circular economy enablement by:

- Discovering lesser-known investment opportunities in the field of the energy transition.
- Identifying a company that we believe offers the best impact and growth profile.
- Identifying how public equity managers can accelerate the impact of companies they invest in.

Identify companies that can offer the best environmental impact and growth profile with an active and forward-looking approach

Hari Balkrishna, Portfolio Manager, *T.ROWE PRICE*

3:15 PM EXHIBITOR LOUNGE: CONSULT INDUSTRY EXPERTS

- **Source invaluable insight** and experience the next level of investment innovation first-hand.
- Connect one-on-one with leading asset managers to **overcome investment hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

TRACK 1

3:45 PM PANEL: PANEL: CLIMATE RESILIENCY

How to build a climate resilient portfolio

The impacts of climate change are creating a volatile landscape for investors. Explore how endowments are working with their stakeholder groups to manage climate risks that are material to their investment strategy. We will discuss:

- How an endowment thinks about climate from a strategic investment perspective
- How organizations get started with climate and how they think about it across different asset classes

Take away tangible examples of sustainability and decarbonization practices for various investors.

Arijit Banik, Treasurer, *York University*

Kevin Quinlan, Senior Director, Climate and Client Strategy, *SLC Management*

Ailey Roberts, Global Head of Sustainable Investing, *BGO*

Catherine Jackman, Managing Director, *SLC Management*

TRACK 2

3:45 PM FIRESIDE: CHARTING A COURSE BETWEEN 60/40

Delve into a comprehensive conversation around constructing a diversified portfolio that encompasses all asset classes across public and private markets. Explore how this strategy supports long-term sustainability and growth objectives, while tackling the complexities of diversification in public markets. Gain valuable insights to refine your investment approach and drive greater financial outcomes.

- Identify how to strategically diversify your portfolio mandate by building upon a foundation of public equities and fixed income to incorporate alternative investments like real estate, infrastructure, private equity, and private debt.
- Explore a tactical approach to balancing cash flow requirements with long-term investment growth, ensuring alignment with future goals.
- Learn how this strategy mitigates risk aims to minimize the impact of market volatility on the portfolio, promoting stability and sustainable growth.

Bill Tilford, Head of Asset Management Operations, *Nicola Wealth*

William Scott, Managing Director, *CPP Investments*

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 education on 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: SELLING THE BASICS

Convincing your Donors to Fund Ongoing Programs

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. Discuss 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, **identify best practices** and prepare for the day ahead.

8:25 AM OPENING COMMENTS FROM YOUR HOST

Gain insight into today's sessions so you can get the most out of your conference experience and maximize your value.

Jeffry Haber, Senior Director, Finance, *Commonwealth Fund (Iona University)*

8:30 AM OPENING FIRESIDE KEYNOTE: DEVELOPING POLICY & STRATEGIC PLANS

Find your Next High-Growth Investment Opportunity and Reduce Resource Consumption

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.

Vijay Venkatesan, VP Finance & Operations, *London Community Foundation* MODERATOR

9:00 AM C-SUITE EXCLUSIVE: CHALLENGES & OPPORTUNITIES FOR INSTITUTIONAL INVESTORS IN 2024

Global inflation looks set to cool but will likely remain above comfort levels at 3%. A number of elections around the world are taking place in 2024 adding to an environment of uncertainty. This and many other challenges are facing institutional investors in 2024. However, there are also opportunities to increase returns and mitigate risk. Take away insight and guidance from our C-Suite panel to:

- Adjust your strategy to reflect the realities of the current global environment.
- Make difficult operating decisions to lower down the costs.
- Navigate times of ambiguity and risk.

Help your portfolio maintain returns and mitigate risk in uncertain and dynamic times.

Arijit Banik, Treasurer, *York University*

Vani Visva, SVP, Finance & Operations, *VHG & UBC Hospital Foundation*

Jessica Diniz, CEO, *Juvenile Diabetes Research Foundation*

9:30 AM 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.
- Adapt to changing donor and recipient demands with more ease, with ringfenced funding.

Increase and level funding across all your programs.

10:00 AM ROUNDTABLES À DISCOVER THOUGHT-PROVOKING IDEAS (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 - \$1B

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 \$1B+

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 **gain institutional investment expertise**.
- Take advantage of **event-specific offers** and special content.
- Schedule **one-to-one private meetings** for personalized advice.

11:00 AM CASE STUDY: 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

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- 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: UNLOCK REAL ESTATE POTENTIAL

What Economic Factors Contribute to Stability of a Real Estate Investment

Trends in Residential Real Estate Investing are worth considering. Create a strategy to identify:

- Economic factors/indicators that affect real estate investing.
- Valuation of real estate – methods and why it's important.
- Good opportunity for institutional investors.

Make informed decisions based on key economic factors and their impact on real estate investment.

Beau Madsen, Chief Investment Officer, *RISE PROPERTIES*

Arijit Banik, Treasurer, *York University*

Vani Visva, SVP, Finance & Operations, *VHG & UBC Hospital Foundation*

12:00 PM INDUSTRY EXPERT: DONATIONS

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 **investing colleagues**.

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

- Browse through different sponsor booths and **gain institutional investment expertise**
- 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.

Sarasin & Partners

TRACK 1: ALIGNING INVESTMENT PRIORITIES

2:15 PM

CASE STUDY: USING COMMUNITY FINANCE TO FIGHT THE HOUSING CRISIS

To counter the affordability crisis, Canada needs millions of new homes – very quickly. Transform your organization into a solution-ready foundation and learn about investing directly in communities. Take away actionable strategies on community bonds, an innovative investment vehicle, and practical insights on:

- The pressing need affordable housing providers face for flexible, accessible capital
- The community bond model: how it works, and how affordable housing providers are using it to turn their social capital into financial capital
- The wave of philanthropic organizations interested in moving assets into community investments, like community bonds

Timothy Kent and Rhonda Kent, *Redwood Park Communities*

Nick van der Velde, *Indwell*

Jennifer Bryan, Senior Campaign Manager, *Tapestry Community Capital*

TRACK 2: DEFINING IMPACT & ESG

2:15 PM

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 and 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.

Thursday, May 2, 2024

TRACK 1: ALIGNING INVESTMENT PRIORITIES

2:45 PM PRESENTATION: STIMULATING POSITIVE CHANGE

Adopting a “Whole System Approach” to Catalytic Impact Investment

Canadian technology and science innovators have historically punched above their weight when it comes to seeding high impact innovation that can transform society for the better. However, much of that innovation struggles to emerge past the early stages due to deeply embedded structural constraints. To truly unlock impact at scale requires more than just capital. It requires embracing a “system level approach” to create the conditions for success and to complement investment. Create executive strategies on innovative investment approach by:

- Leveraging venture philanthropy to invest in the highest-potential Canadian technology and science ventures, starting with hardtech climate solutions.
- Funds systems-change initiatives in parallel with venture philanthropy that remove critical bottlenecks and exploit opportunities to scale impact of those investments and ventures.
- Produces a regenerative loop inside a charitable structure to fund impactful Canadian innovation in perpetuity.

Multiply your impact by bridging your investment and philanthropic strategies.

Krista Jones, CEO, *Mars Discovery District*
Leah Parry, Senior Manager, CleanTech & Venture Services, *Mars Discovery District*

TRACK 2: DEFINING IMPACT & ESG

2:45 PM PRESENTATION: 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.

Jeffry Haber, Senior Director, Finance, *Commonwealth Fund (Iona University)*

3:15 PM EXHIBITOR LOUNGE: CONSULT INDUSTRY EXPERTS

- **Source invaluable insight** and experience the next level of investment innovation firsthand.
- Connect one-on-one with leading asset managers to **overcome investment hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

3:45 PM SPOTLIGHT:

Targeted Investments to Decarbonize the Building Sector

The Atmospheric Fund (TAF) operates to speed-up and scale-up carbon emissions reductions in the Greater Toronto and Hamilton Area (GTHA). Impact investing is one of the key tools we use to do this. If we are to reach our net zero goals, it is critical to invest in low-carbon building solutions because the building sector dominates as a source of urban emissions. This session will:

- Outline factors that support the case for investing in building decarbonization.
- Profile how to evaluate opportunities to achieve positive climate, equity, and financial impact.
- Provide a snapshot of investments in new construction and building retrofits.
- Identify emerging opportunities for investment in building sustainability.

Tracy Haynes, Investor Relations Manager, *The Atmospheric Fund*

4:15 PM CLOSING KEYNOTE: SHIFT FROM PASSIVE TO ACTIVE ENGAGEMENT INVESTMENT

How to Navigate the Shift from Passive to Active Investment Style

It is significant to improve understanding of what tools are in the toolbox. Take away executable strategies to

- Become more active even with very limited resources.
- Identify where you are on the spectrum of investors.
- Identify your next steps.

Examine the underlying thesis of why or why not to become more active.

Sarah Charters, President, *United Church of Canada Foundation*

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.

Jeffry Haber, Senior Director, Finance, *Commonwealth Fund (Iona University)*

5:00 PM CONFERENCE CONCLUDES

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