23rd Annual

Foundation, Endowment & Not For Profit Investment Summit

March 5 & 6, 2025

Hyatt Regency, Toronto, Ontario.

A prestigious gathering of senior foundations, endowment, and key investment decision-makers

Welcome to a New Era of Institutional Investing

REGISTER NOW

WELCOME TO THE FUTURE OF INVESTMENT INNOVATION

Welcome to the Foundation & Endowment Investment Summit 2025, where Canada's leading institutional investors converge to navigate a complex financial landscape.

As foundations and endowments face unprecedented challenges—from market volatility to evolving ESG priorities—this summit brings together visionary leaders to explore innovative strategies for both financial returns and social impact.

Join us in Toronto this March for two days of intensive learning, strategic insights, and meaningful connections with peers who are shaping the future of institutional investing.

www.foundationendowmentsummit.com

REGISTER NOW

Get Ready to Innovate & Implement

GET READY TO DISCOVER AND NETWORK WITH FINANCIAL SERVICES LEADERS!

Compelling Keynote Sessions

- **Global Market Outlook:** Navigate volatility and spot emerging trends for increased returns
- **Polycrisis World:** Transform local actions into global impact
- **ESG Integration:** Balance mission-related investments with financial performance

Asset Allocation Roundtables

- Fixed Income Strategies
- Alternative Investments
- Private Equity Opportunities
- Real Estate & Infrastructure
- ESG & Impact Investing

Executive Insights

- **UNICEF Canada - Purpose-Driven Impact:** Shaping future investment strategies
- **WWF-Canada - Value Beyond Profit:** Seizing opportunities in impact investing
- **VGH & UBC Foundation - Governance Excellence:** Building robust investment frameworks

Networking Opportunities

- **Speed Networking Sessions:** Connect with industry peers
- **Evening Reception:** Build relationships over cocktails and conversation
- **Exhibitor Lounge:** Engage with leading investment solution providers
- **Networking Breakfasts:** Start your day with meaningful discussions

Strategic Deep Dives

- **Portfolio Management:** Balance long-term vision with short-term funding demands
- **OCIO Partnerships:** Master outsourced CIO relationships for optimal results
- **CRA Compliance:** Navigate new regulatory changes and maximize donation potential

Secure Your Place at Canada's Premier Foundation & Endowment Investment

REGISTER NOW

SPEAKER LINE-UP

Handpicked for you

... AND MANY MORE!

ERIC LASCELLES
Managing Director & Chief Economist
RBC

ANGELA CHAPMAN
CEO
VGH & UBC Foundation

DONNA ZIEGLER
Executive Director
South Saskatchewan Community Foundation

AKASH RATTAN
Audit and Finance Committee
Surrey Hospitals Foundation, BC College of Pharmacists

MICHAEL (ROBERT) ANHORN
CEO
Canadian Mental Health Association (CMHA) Toronto

ARIJIT BANIK
Treasurer
York University

DIONNE BROADUS
National VP, Philanthropy & Impact Investing
American Heart Association

JAMISON STEEVE
CEO
Metcalf Foundation

JEFFRY HABER
Sr. Director, Finance
Commonwealth Fund

JUDY ZHU
Executive Director
Royal Columbian Hospital Foundation

SEVAUN PALVETZIAN
CEO
UNICEF Canada

IDALIN MCKENZIE
VP, Finance and Asset Management
YWCA Hamilton

SAMEER CHETTRY
Director, Finance & Operations
Saskatoon Community Foundation

SARAH CHARTERS
CEO
United Church of Canada

ANDY SULLIVAN
VP, Asset Management
YWCA of Southwestern Ontario

Who attends?

Ducks Unlimited Canada
MaRS Centre for Impact Investing
greenchip Financial
KITS FOR A CAUSE
UHN
The United Church of Canada Foundation
VELUT ARBOR ITA RAMUS
UVIC
Canadian Baptists of Western Canada
VGH UBC hospital foundation
Mon Sheong Foundation Celebrating 60th Anniversary
The Commonwealth Fund
SHN Scarborough Health Network
Heart & Stroke Foundation of Canada Finding answers. For life.
Jim Pattison Children's Hospital Foundation
Markham Stouffville Hospital Corporation
La fondation McConnell Foundation
preqin
David Suzuki Foundation One nature.
SickKids Foundation
TAF
Médecins Sans Frontières 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."

Louis Brier Jewish Aged Foundation

"Great series of speakers that addressed a variety of good topics."

University Hospital Foundation (Edmonton)

"Good speakers, well organized, well presented. "

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."

Foundation of Kingston and Area

AGENDA - DAY 1

Wednesday, March 5, 2025

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.

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

9:00 AM KEYNOTE SESSION: A GLOBAL MARKET OUTLOOK FOR INSTITUTIONAL INVESTORS

How to Spot Trends and Increase Returns

The markets have been volatile in the last few years and there are a lot of questions about inflation, and a potential recession. More significantly, it is important to know 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.
- Explore macroeconomic indicators, geopolitical developments, and sector-specific trends.
- Address the looming potential recession and inflationary pressures: the peaks and troughs ahead

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

Arijit Banik, Treasurer, York University
Eric Lascelles, Chief Economist, RBC Asset Management

9:30 AM SPOTLIGHT: GLOBAL SHIFTS IN A NEW, POLYCRISIS WORLD

Harnessing the Power of Purpose to Shape the Future

In today's rapidly changing landscape—marked by geopolitical shifts, climate change, evolving migration patterns, and the transformative potential of AI—there are unparalleled opportunities for impactful action. This session will empower you to:

- Leverage Purpose for Impact: Discover how foundations, endowments, and NGOs can play a pivotal role in creating positive change and shaping a better future.
- Unpack the Risks, Rewards and Impact Return of Global Action: Maximize effective alignment of your mission within an ever-changing global context.
- Transform Local Actions into Global Impact: Understand how Canadian based drive significant global outcomes, amplifying your organization's reach and influence.

Drive meaningful change in this complex world and create a lasting legacy through purpose-driven action.

Sevaun Palvetzian, CEO, *UNICEF Canada*

10:00 AM INDUSTRY EXPERT:

Building Resilient Portfolios Amidst the Intricacies of Today's Global Markets and Emerging Risks in 2025

As we navigate through 2025, the investment landscape is shaped by evolving economic and political dynamics. Will higher bond yields threaten equity markets, and how might shifts in fiscal policy impact future returns? In an era marked by high market concentration, is it prudent to rely on a few dominant stocks? These pivotal questions will guide our exploration into current market trends and the strategies needed to build resilient portfolios. Join us to delve into how these factors interplay and what they might mean for portfolio management in today's complex environment. This discussion will provide actionable insights to help you navigate the intricacies of global markets and emerging risks.

Adam Farstrup, Head of Multi-Asset, Americas, *Schroder*

10:30 AM MORNING COFFE BREAK

10:45 AM INDUSTRY EXPERT: APPROACHES TO CLIMATE-ALIGNED INVESTING

Meeting Investor Objectives

Last year, we explored the spectrum of ESG investment products and the different outcomes they can achieve. This year, we take the conversation a step further – focusing on how investors can integrate climate considerations into their portfolios. With increasing expectations to align investments with a low-carbon future, we will examine the different approaches available and what they mean for portfolio construction across asset classes. This session will provide a practical framework for navigating climate-aligned investing in a rapidly evolving regulatory and market landscape.

Agneta Bamania, Senior Sustainable Investing Analyst, *Aviva Investors*

11:15 AM C-SUITE EXCLUSIVE: BUILD A ROBUST TEAM, MANAGEMENT AND GOVERNANCE STRUCTURE

Enabling Growth, Improvement and Strengthening of a Foundation's Funds, Impact and Endowment Portfolio

Leave a trail of growth, improvement and strength in your wake by transforming your organization's assets. Master success factors to:

- Working in harmony with the Chair and Board to achieve long term objectives
- Achieving impact and collaborative philanthropy
- Utilizing the expertise of external investment managers to maintain purchasing power of your Foundation's main endowment

Work in collaboration with your team and increase assets of your foundation

Michael (Robert) Anhorn, CEO, *Canadian Mental Health Association (CMHA) Toronto*
Jamison Steeve, CEO, *Metcalf Foundation*
Amanda Ram, Interim Executive Director and Chief Financial Officer, *The National Ballet of Canada*
Emerson Savage, Head of Public Markets Sales, *Fiera Capital* MODERATOR

AGENDA - DAY 1

Wednesday, March 5, 2025

11:45 AM SPEED NETWORKING AND EXHIBITOR LOUNGE! 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.**
- 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**.
- 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.

12:00 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**.

1:00 PM INDUSTRY EXPERT: COMMUNITY BONDS

Shift Power and Resources Directly to Communities While Earning A Fair Return

2025 is set to be a record year for community bonds, with over $100 million set to be raised. What are community bonds? Similar in many ways to traditional bonds, they are an interest-bearing loan from an investor, which has a set rate of return and a fixed term. Both institutional and retail investors can purchase community bonds directly from nonprofits and coops to help:

- Finance socially beneficial projects, like affordable housing development or community arts venues.
- Offer organizations a path to affordable, values-aligned, and self-determined capital and investors a chance to support meaningful projects.

Master success factors on how and why institutional funders like foundations and non-profits across the country are moving some of their investments into community bonds.

Thomas DiCarlo, Chief Financial Officer, Services and Housing in the Province (SHIP)
Faiz Abhuani, Founder and Director, Brique par brique
Ryan Collins-Swartz, Co-Executive Director, Tapestry Community Capital MODERATOR

1:30 PM INDUSTRY EXPERT: IMPACT BONDS

For investors looking for an entry point into Impact Investing, are impact bonds a no-brainer?

Impact bonds look and feel like conventional bonds, but their proceeds are uniquely used to finance environmental and social oriented investments. Discover how the Impact Bond market can be the vehicle for those investors looking to gain sustainable investment exposure while sticking to their overall investment plan.

- Impact is not ESG
- What about impact bonds is not conventional
- The outlook for bonds – impact and otherwise

Gary Morris, Head of Fixed Income, CIDEL Asset Management Inc.
Sarah Charters, President, **The United Church of Canada Foundation**

2:00 PM CASE STUDY: BALANCING MISSION-RELATED INVESTMENTS (MRI) AND RETURNS

Promote long-term social impact through intended investment & generate measurable social or environmental benefit and a financial return

Foundation and endowment investors are increasingly pressured to align their investments with their missions, whether through mission-related investing (MRI) or program-related investing (PRI). Design your investment strategy that yield the same financial returns as traditional investments. Create an action plan to:

- Align mission-driven investments with financial performance can enhance both impact and profitability.
- Evaluate the social and environmental impact of MRI, enabling better decision-making and reporting.
- Balance mission and returns, highlighting best practices and lessons learned.

Equip participants with knowledge to navigate the evolving investment environment in MRI landscape

Idalin McKenzie, VP, Finance and Asset Management, *YWCA Hamilton*

2:30 PM INDUSTRY EXPERT: THE VALUE OF DIVERSIFICATION

How to Find the Right Strategies for Your Portfolio

Diversification is the process of allocating assets across a range of different strategies to optimize returns when experiencing different macroeconomic environments. It is often referred to as the only "free lunch" when it comes to investing. Sounds good in theory, however it is crucial to explore:

- How diversification works
- What type strategies are considered diversifiers
- The different dynamics for each strategy.

Peter Muldowney, Head of Institutional & Multi-Asset Strategy, *CC&L Financial Group*
Anish Chopra, Managing Director, Portfolio Management Corporation & Investment Committee member , *Lawson Foundation.*

3:00 PM NDUSTRY EXPERT: PROTECTING INVESTMENT GAINS THROUGH EFFICIENT IMPLEMENTATION

What is the hard-dollar cost of unintended risk or operational inefficiencies?

As institutional investors seek to maximize their portfolio's investment returns, it is important to know just how much of a portfolio's potential returns are lost due to poor implementation. Armed with that knowledge, how might an investor plug their performance leaks? In this session, Nick Zylkowski will share real-world strategies and case studies used successfully today by endowments and foundations to minimize performance leakage and reduce implementation costs. Nick will equip participants with knowledge, tools, and strategies they can implement to protect their investment returns.

AGENDA - DAY 1

Wednesday, March 5, 2025

Equip participants with tools and strategies to protect and maximize their investment returns.

Nick Zylkowski, Managing Director, Co-Head of Customized Portfolio Solutions, ***Russell Investments***

3:30 PM NETWORKING & 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.

3:45 PM ASSET ALLOCATION ROUNDTABLES

Discover the benefits and risks of various assets classes and how they can impact your portfolio for the better. Portfolio diversification is essential for higher, sustainable returns. Don't miss this unique opportunity.

1. **Fixed Income:** Investments that provide regular income through interest payments, typically considered lower risk than equities. ***MFS Investment Management***
2. **Alternative Investments:** Diverse assets outside traditional stocks and bonds, including hedge funds, venture capital, and collectibles, often aimed at higher returns and lower correlation. ***Forthlane Partners***
3. **Multi-Asset Funds:** Investment funds that allocate capital across various asset classes to optimize risk and return based on market conditions. ***Trans-Canada Capital***
4. **Liquid Alternative Investments:** How these strategies (ie. long/short equity or credit, merger arbitrage, global macro) focus on delivering better risk-adjusted returns/lower correlations and how they can help diversify a portfolio. ***Picton Mahoney***

4:10 PM THE OCIO MODEL

Promote maximum impact by generating strong risk-adjusted returns using an outsourced team of investment experts, allowing your institution to withstand difficult market environments which often coincide with difficult environments for those affected by your programming.

Foundations, endowments, and not-for-profits have various spending policies in place (ex. 5% of assets annually) and aim to preserve purchasing power indefinitely. These challenging investment objectives require a sophisticated investment approach. In an increasingly complex investment environment, particularly for smaller scale institutions, it can be prohibitively expensive to attract and retain the top talent necessary to have a world-class internal investment team.

- The main reasons to partner with an OCIO, including having a "one stop shop", diversifying beyond stocks and bonds, access to exclusive strategies, and customization
- The main drawbacks of an OCIO, including third-party involvement, governance and reporting, and fees
- Understanding how scale impacts your institution's optimal approach to investing

Equip participants with knowledge to make an informed decision regarding whether an OCIO could make sense for their organization.

Anthony Berg, Investment Analyst, ***Forthlane Partners***
Robert Vanderhooft, Co-Chief Investment Officer, ***Forthlane Partners***
Vanessa Hui, Chief Client Officer, ***Forthlane Partners*** MODERATOR

4:40 PM CLOSING FIRESIDE KEYNOTE: NAVIGATING LONG-TERM VISIONS AND SHORT-TERM FUNDING DEMANDS

Long-Term Horizon vs. Short-Term Funding Needs

While endowments and foundations typically invest with long-term horizons, short-term funding needs for operations, grants, and programs can create challenges in portfolio management. Create an action plan to:

- Protecting long-term capital and meeting immediate funding needs
- Pronouncing the needs clearly during periods of economic downturn or heightened market volatility.
- Avoid leading to liquidating assets at suboptimal times.

Adam Hicks, Director of Finance and Strategic Initiatives, ***South Saskatchewan Community Foundation***
Donna Ziegler, Executive Director, ***South Saskatchewan Community Foundation***

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!

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

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!

6:30 PM CONFERENCE ADJOURNS TO DAY TWO

AGENDA - DAY 2

Thursday, March 6, 2025

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.

8:45 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.

Sherry Larjani, President & Founder, **Spotlight Development Inc.**

9:00 AM — KEYNOTE SESSION: 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.

Frédéric Gauvin, M Sc., CFA, President and Chief Investment Officer, **Université de Sherbrooke**
Jordan Peckham, Founder, Chief Executive Officer, **PaceZero Capital Partners Ltd**
Jeffry Haber, Sr. Director, Finance, **Commonwealth Fund** MODERATOR

9:30 AM — C-SUITE EXCLUSIVE: MAXIMIZING RETURNS THROUGH PRIVATE INVESTMENTS & DIVERSIFICATION STRATEGIES

In today's dynamic investment landscape, institutional investors face unique challenges when it comes to meeting disbursement requirements and achieving long-term financial goals. This session will delve into how private investments can be a crucial component of institutional portfolios and drive both growth and stability. Industry experts will also share their insights on building and managing diversified portfolios that leverage private investment opportunities for maximum impact.

1. **Impact of Private Investments on Portfolio Performance:** Learn about the measurable benefits private investments bring to institutional portfolios, from driving higher returns to stabilizing performance during volatile market conditions.
2. **Designing a Private Investment Portfolio:** Discover critical considerations for building the right private portfolio for your organization, including asset allocation strategies, risk management, and long-term goals.
3. **Diverse Asset Classes in Private Investment:** Gain a deeper understanding of the various private investment asset classes—such as private equity, real estate, and venture capital—and how they contribute to the diversification and success of a portfolio.
4. **Diversification and Real Estate Impact Investments:** Hear from the second speaker about the role of real estate as a diversification strategy, including how impact investments in real estate projects can drive both financial returns and social value.
5. **Evaluating and Adapting Investment Strategies:** Understand the importance of ongoing evaluation and adaptation in investment portfolios, especially when considering the growing demand for diversification and social responsibility in institutional investing.

Angela Chapman, CEO, **VGH & UBC Foundation**
Akash Rattan, Audit and Finance Committee, ***Surrey Hospitals Foundation, BC College of Pharmacists***
Mathieu Larochelle, Senior Director, Equity and Alternative Investments, **Trans-Canada Capital** MODERATOR

10:00 AM — INDUSTRY EXPERT: BEYOND THE MARKET

Goal Based Portfolio Construction for Endowments and Foundations

Investment allocators and directors at endowments and foundations face many challenges in finance. Against a softer market backdrop and complex investment landscape, organizations need best-in-class partners with expertise to achieve their goals. In this session, Robert Wilson, Head of Portfolio Construction at Picton Mahoney Asset Management will walk through:

- The state of the investment landscape and modern portfolio theory
- How organizations can construct portfolios to better achieve their goals
- The building blocks of more resilient portfolios
- Case analysis for portfolio construction
- Finding the right partners in the investment industry

Robert Wilson, SVP, Head of Portfolio Construction Consultation Services, **Picton Mahoney Asset Management**

10:30 AM — ROUNDTABLES DISCOVER THOUGHT-PROVOKING IDEAS

Michaël Beaupré, Managing Director, Client Relationships**, Institutional Mortgage Capital**
Ken McKinnon, Senior Managing Director and Equity Partner, **Institutional Mortgage Capital**

11:00 AM — SPEED NETWORKING IN EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- 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.

AGENDA - DAY 2

Thursday, March 6, 2025

11:30 PM SPOTLIGHT: ETHICAL INVESTMENT TRADE-OFFS

Donor Pressure and Stakeholder Expectations

Donors, alumni, and other stakeholders increasingly expect foundations and endowments to reflect certain ethical or social values in their investment strategies, such as divesting from fossil fuels, promoting racial equity, or supporting gender inclusion. Adapt best practices to:

- Taking difficult decisions, as some of these investments may not align with traditional risk-return models.
- Evaluating the potential trade-offs between aligning with stakeholder values and maintaining traditional risk-return profiles, ensuring informed decision-making.
- Balancing ethical considerations with financial performance, allowing foundations to meet stakeholder expectations without sacrificing returns.

Communicate your investment approach to stakeholders, fostering transparency and building trust while addressing their concerns.

Akash Rattan, Audit and Finance Committee, **Surrey Hospitals Foundation, BC College of Pharmacists**

12:00 PM INDUSTRY EXPERT: FIXED INCOME ALLOCATION

Rethinking Fixed Income Allocations in Today's Market

In the "new normal" of lower interest rates, investors have been readjusting their fixed income allocations. Given the large fixed-income allocations in most institutional portfolios, it is critical to update bond allocation to bring balance and better long-term outcomes. Create a roadmap to:

- Readjusting fixed income allocation
- Exploring the most worthwhile strategies
- Examining the risks and opportunities presented by different sectors

Reassess fixed income strategies considering fluctuating interest rates, considering shorter-duration bonds and inflation-linked securities to mitigate interest rate risk.

Soami Kohli, Fixed Income Portfolio Manager/Investment Officer, **MFS Investment Management**

12:30 PM CASE STUDY PANEL:

How Should E&Fs Leverage Alternatives to Meet Their Goals

- What are the strengths and drawbacks of different alternatives for the portfolio
- How to identify the right strategic asset mix between traditional assets (e.g. equities, bonds) and various alternatives
- Are there any investment management models which have worked particularly well for endowments? (e.g. Swensen model, Maple model)
- How to think about partnership with GPs and service providers in alternatives

Michael Ashmore, Chair, Finance & Investment Committee, **University of Waterloo**
Joe Rooney, Board of Directors, **Georgian Bay General Hospital Foundation**

1:00 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.

2:00 PM THE BUSINESS CASE FOR INVESTING IN NATURE

A growing number of Canadian businesses are recognizing that investing in nature isn't just a moral imperative, it's good business. Protecting and restoring nature improves corporate resilience, offers a first-mover advantage as global regulators, including those in Canada, make disclosure on nature-related impacts a priority and can spur innovation to develop new products and services that have a smaller environmental footprint. Takeaways:

- Why investing in nature is a financial imperative
- How nature-based solutions can help mitigate business risks and offer opportunities for innovation
- An action plan for including biodiversity in your ESG strategies

Kathrin Majic, SVP, Development, **WWF-Canada**
Jeffry Haber, Senior Director, Finance, **Commonwealth Fund** MODERATOR

2:30 PM PRESENTATION: PROTECT YOUR ASS(ETS)

Effective Lifecycle Planning for Non-Profit Properties

Skip the maintenance, feel the pain—just like exercise, smart planning builds strong assets.

- Understanding Asset Risk
- The Fundamentals of Lifecycle Planning
- Funding and Financial Strategies
- Best Practices for Non-Profits

Andy Sullivan, VP, Asset Management, **YWCA of Southwestern Ontario**

AGENDA - DAY 2

Thursday, March 6, 2025

3:00 PM | **FIRESIDE: ALTERNATIVE INVESTMENTS AND INCREASED USE OF PASSIVE INVESTEMENT**

When you look at the large shifts in institutional investing you see the move to alternative investments, the use of OCIO, the incorporation of DEI and ESG. Now it looks like the next paradigm shift will be the increased use of passive investments for marketable investing. Many institutional investors are having difficulty in hiring global equity managers that will outperform an index, whether it be ACWI or S&P. Navigate through the process of:

- Advantages and disadvantages to investing in an index
- More advantages than compensate for the disadvantages

Jeffry Haber, Sr. Director, Finance, **Commonwealth Fund**
Joe Rooney, Board of Directors, **Georgian Bay General Hospital Foundation** MODERATOR

3:30 PM | **NETWORKING & 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.

4:00 PM | **CASE STUDY:**

Community-driven Investment in Youth for Social and Generational Impact.

- Large systemic challenges with youth, such as homelessness
- Research informed by the people impacted (homeless, youth, community organizations, etc.). Vital Signs Report and Vital Focus: Youth
- Recommendations also shaped by those impacted and Youth Advisory Council
- Case and Theory of Generation for Change

Sameer Chettry, Director, Finance & Operations, **Saskatoon Community Foundation**
Fred Reibin, Brand Manager & Stakeholder Engagement Lead, **Saskatoon Community Foundation**

4:30 PM | **CLOSING KEYNOTE:**

Ongoing updates to securities laws have rendered a number of charitable deposit programs out of compliance with the regulations required by those laws

- During 2019 and 2020, some Provincial Securities Commissions focused much more intently on these types of programs, prompted by a recent failed faith-based extension fund.
- The evolved regulations encompass all organizations that accept security-like deposits of any kind.
- Exemptions or 'loopholes' are actively being eliminated, therefore seeking special relief from securities regulators is slow, costly, and ultimately likely to be futile.
- As time marches on, the regulators will be less willing to grant grace for non-compliance and are stepping up stringent oversight.
- Hear the story of how one organization with approximately $115 Million under administration dealt with this issue.

Meynard Wiersma, Executive Director, **Christian Stewardship Services**
Rob Vandebelt, Mortgage Broker (Principal), **CAPSTONE Mortgage Services**

5:00 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.

Sherry Larjani, President & Founder, **Spotlight Development Inc.**

5:15 PM | **CONFERENCE CONCLUDES**

23rd Annual

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March 5 & 6, 2025

Hyatt Regency, Toronto, Ontario.

How to register

REGISTER NOW

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

REGULAR TICKET IN PERSON	$1,795

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

REGULAR TICKET VIRTUAL	$1,495

GROUP RATES

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

Sam Caskey
Delegate Sales Executive
Email: sam.caskey@strategyinstitute.com