FUTURE-PROOFING FOUNDATIONS: WHERE CAPITAL MEETS PURPOSE

REGISTER NOW ↗

24th Annual

Foundation, Endowment & Not For Profit Investment Summit

MARCH 10 - 11, 2026 I HYATT REGENCY TORONTO

WWW.FOUNDATIONENDOWMENTSUMMIT.COM #FENI2026


23rd Annual
Foundation,Endowment&
Not For Profit Investment
AVIVA INVESTORS
PICTON MAHONEY

CONTENTS

MESSAGE FROM THE PRODUCER

Dear Colleagues,

It is my pleasure to welcome you to the upcoming 24th Annual Foundation, Endowment, & Not-for-Profit Investment Summit, **Canada's premier gathering for institutional investors advancing mission-aligned financial strategies**.

This summit is designed to empower investment leaders from foundations, endowments, and non-profits with the insights, tools, and partnerships needed to navigate today's complex financial environment while remaining true to their core values. Through in-depth sessions, interactive panels, and peer-driven dialogue, you'll gain forward-looking strategies to **strengthen your portfolio, manage risk, and increase impact**.

You'll hear directly from leading institutions, such as **York University, Toronto Metropolitan University, The County Foundation, Scarborough Health Network Foundation,** and **Diabetes Canada**, all sharing actionable lessons from the frontlines of purpose-driven investing. Whether you manage a large or mid-tier fund, our event is designed to meet you where you are and help you grow with confidence.

We look forward to welcoming you to our community of mission-minded investment professionals and to hosting thoughtful conversations that will shape the future of institutional investment in Canada!

Sarah Syed
Head of Content - Foundation, Endowment, & Not-for-Profit Investment Summit Portfolio
Strategy Institute
sarah@strategyinstitute.com

ADVANCING PURPOSEFUL INVESTING: WHERE STRATEGY MEETS IMPACT

The 24th Annual Foundation, Endowment, & Not-for-Profit Investment Summit is set to be our most impactful edition yet, bringing together leading investment decision-makers, mission-driven institutions, and financial innovators to explore the evolving landscape of institutional investing.

- Over two focused days, the summit will unpack cutting-edge strategies across **portfolio resilience, mission-related investing (MRI), ESG integration, alternative assets, and inclusive capital**, all through the lens of delivering long-term impact and financial sustainability.

- Gain insights from organizations shaping the future of institutional investment, including **York University, Toronto Metropolitan University, Scarborough Health Network Foundation, Imagine Canada, The County Foundation, and Diabetes Canad**a.

- Participate in **highly curated sessions, peer-led roundtables, and exclusive case studies** designed to help both large and mid-tier foundations align their portfolios with purpose.

WHY ATTEND?

Step into the 24th Annual Foundation, Endowment, & Not-for-Profit Investment Summit, where mission meets mastery! Engineered to deliver high return on both financial and social investment, this event builds your strategic toolkit with deep insights, immersive learning, and powerful connections. Here's what awaits you in 2026:

STRATEGIC INVESTMENT INSIGHTS

Explore how to balance liquidity needs with growth goals, strengthen your governance practices, and align your capital with mission-driven outcomes.

INTERACTIVE SESSIONS

Participate in practical, expert led sessions designed to help you overcome investment roadblocks, optimize asset allocation, and refine your disbursement and risk management strategies for both short- and long-term impact.

HIGH-IMPACT NETWORKING

Join curated roundtables, peer-to-peer exchanges, and one-on-one meetings tailored to your asset size and investment approach to build meaningful connections with investment leaders from across Canada.

TAILORED, MISSION-ALIGNED CONTENT

Discover how to implement mission-related investing (MRI), integrate ESG and DEI principles into your portfolio, and navigate challenges like inflation, illiquidity, and market volatility with confidence.

HAVE FUN

There's plenty to enjoy throughout the summit, including an evening reception with cocktails and prizes. Indulge in the perfect chance to wind down in a fun and friendly environment.

NETWORK AND HAVE FUN

Networking and fun take centre stage at this year's event, offering the perfect balance of professional connections and social experiences. Start your day with engaging conversations at our networking breakfasts, where you can meet industry peers over coffee and fresh bites. In the evening, unwind at our cocktail reception, where great drinks, lively discussions, and new opportunities come together in a relaxed, social setting.

AGENDA AT A GLANCE

From expert-led sessions and thought-provoking keynote speakers to interactive workshops and networking opportunities, every moment at the 24th Annual Foundation, Endowment, & Not-for-Profit Investment Summit is designed to inspire, engage, and equip you with the insights and tools needed to succeed. Prepare for two days filled with innovative ideas, meaningful connections, and valuable takeaways that will elevate your experience and leave you motivated for what lies ahead.

STRATEGIC INSIGHTS

- Scale **mission-aligned investment strategies** across your portfolio.
- Unlock new value streams through **alternative and impact assets**.
- Build resilient investment frameworks that **balance risk and long-term return**.

LIVE DEMOS

- See emerging tools for **ESG screening** and impact measurement in action.
- Explore new platforms for **portfolio analytics and reporting**.
- Test drive solutions for **OCIO management, liquidity modelling**, and more.

INTERACTIVE SESSIONS

- Navigate real-world scenarios in **fiduciary risk and compliance**.
- Build the case for **mission-related investing** with your board.
- Turn complex portfolio data into narratives that **engage stakeholders**.

WORLD-CLASS CONTENT

- Design asset mixes **built for market uncertainty** and social return.
- Implement **governance models** that scale with your investment mandates.
- Learn how to **adopt MRI and PRI strategies** without compromising returns.

NETWORKING

- Join **peer-led roundtables** based on portfolio size and mission focus.
- **Connect with leaders** from foundations, universities, and NFPs.
- Engage with **asset managers and consultants** in curated one-to-one meetings.

FUTURE TRENDS

- Prepare for evolving regulations around **sustainable finance** and ESG disclosure.
- Explore inclusive capital models and **Indigenous-led investment approaches**.
- Align your portfolio with a just transition, **equity goals**, and long-term resilience.

WHO ATTENDS?

We pride ourselves on having attendees from some of the biggest names across the foundation, endowment, and non-profit investment landscape. This is your opportunity to join them and be a part of the incredible story of the 24th Annual Foundation, Endowment, & Not-for-Profit Investment Summit.

RBC
York University
unicef canada
SickKids Foundation
Metcalf Foundation
World Vision
The Commonwealth Fund
VGH UBC hospital foundation
University of Waterloo
American Heart Association
YWCA Hamilton
South Saskatchewan Community Foundation
Surrey Hospitals Foundation
The United Church of Canada Foundation
Canadian Mental Health Association Toronto
Royal Columbian Hospital Foundation
Connor, Clark & Lunn Financial Group
Portfolio Management Corporation
Université de Sherbrooke
The Law Foundation of Ontario
Diabetes Canada
University of Calgary
UVIC University of Victoria Canada
Canadian Baptists of Western Canada
starlight children's foundation
oakville community foundation
The Princess Margaret Cancer Foundation UHN
Huron University
JSMF James S. McDonnell Foundation
WWF
Heart&Stroke
mastercard foundation
Ontario Trillium Foundation / Fondation Trillium de l'Ontario
Calgary Foundation For Community, Forever
Fondation McConnell Foundation
Edmonton Community Foundation
The University of Winnipeg Foundation
Calgary Foundation For Community, Forever
Alberta Cancer Foundation
SouthlakeHealth Foundation

TESTIMONIALS

Don't just take our word for it! Here's what some of our previous delegates have said about this incredible summit.

"Fantastic mix of charities and investors — practical insights, great networking, and one of the best summit lunches yet!"

Vancity Community Foundation

"Excellent, knowledgeable speakers covering relevant topics — app was super useful, and updates on market volatility and disbursement changes were spot on!"

The University of Winnipeg Foundation

"Great networking with insightful panels on asset allocation and risk."

The Law Foundation of Ontario

"Fantastic experience! Loved the web app for schedule and connections, and the session on community bonds was excellent. Great insights on managing board expectations and value investing."

Waypoint Centre for Mental Health Care / Centre de soins de santé mentale

"Very satisfied — insightful sessions on market volatility and community foundations."

the Sprott Foundation

"Very helpful for non-specialists — excellent insights on impact investing and small foundations, plus fantastic networking opportunities."

Christian Stewardship Services

SPEAKER LINE UP

MANY MORE ↗

Our agenda is delivered by top investment experts from Canada's leading foundations, endowments, and non-profits. Not only will you get to hear from world-class speakers at the top of their game, but you also get to meet and network with them.

Tim D'Souza
VP, Finance & Business Operations
Diabetes Canada

Arijit Banik
Treasurer
York University

Vani Visva
VP, Finance & Operations
Scarborough Health Network Foundation

Anna Zsamboki
Senior Director, Treasury & Investing Services
Toronto Metropolitan University

Relay Tangie
VP, Development & Finance
Indigenous Prosperity Foundation

Dominique Jones
Executive Director
The County Foundation

Bruce MacDonald
CEO, President
Imagine Canada

Christy Holtby
VP, Philanthropy
Alberta Cancer Foundation

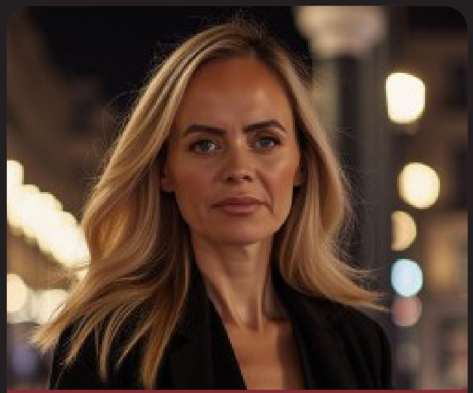
Wayne Miranda
Director, Social Finance & Impact Investing
Definity Foundation

Jory Cohen
Director, Finance & Impact Investment
Inspirit Foundation

SPEAKER LINE UP

MANY MORE ↗

Our agenda is delivered by top investment experts from Canada's leading foundations, endowments, and non-profits. Not only will you get to hear from world-class speakers at the top of their game, but you also get to meet and network with them.



Alana Scott
CEO
Blue Rose Foundation

Lorraine Ballaine
Senior Director, Finance & Accounting
The J.W. McConnell Family Foundation

Marc Gauthier
Treasurer, Chief Investment Officer
Concordia University

Rashid Javed
Chief Operating Officer
Toronto Foundation

FULL AGENDA

Day 1 – Tuesday. March 10, 2026

7:45 AM | NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **institutional investment 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.The explosion of data dependency.

9:00 AM | SPOTLIGHT SESSION: GLOBAL SHIFTS IN A POLYCRISIS WORLD

Harnessing the Power of Purpose-Driven Capital to Shape the Future

In a world shaped by simultaneous global challenges, from climate volatility and geopolitical instability to shifting demographics and rapid technological disruption, foundations, endowments, and non-profits are uniquely positioned to respond with both purpose and capital. Navigate uncertainty, manage evolving risks, and seize opportunities to invest in a more resilient and equitable future. Take away specific solutions to:

- Understand how aligning investments with mission can act as both a financial strategy and a tool for systemic change.
- Balance fiduciary duty with forward-looking risk management to protect and grow capital while supporting long-term impact.
- Expand influence and innovation across borders through local philanthropic and investment actions.

Advance with clarity, conviction, and purpose by leveraging capital to preserve assets, drive meaningful progress, and shape a more resilient future.

Vani Visva, VP, Finance & Operations, **Scarborough Health Network Foundation**

9:30 AM | FIRESIDE KEYNOTE: NAVIGATING THE GLOBAL ECONOMIC CROSSWINDS

Reframe Risk in a World of Sustained Volatility and Rapid Transformation

In a time marked by geopolitical fragmentation, inflationary pressures, climate risk, and shifting monetary policy, institutional stewards of philanthropic capital must recalibrate their long-term investment strategies. Examine the macroeconomic forces reshaping financial markets and understand what they mean for foundations, endowments, and non-profits. Deepen your knowledge on:

- **Global Macro Outlook 2026-2028**: Understand the economic indicators that matter most for long-horizon investors from interest rates and energy markets to trade flows and geopolitical flashpoints.
- **Mission-Aligned Investing in a Polycrisis Era**: Explore how philanthropic institutions can balance values and performance amid environmental, political, and demographic upheavals.
- **Currency, Capital, and Conflict**: Examine what de-dollarization, regional instability, and policy divergence mean for cross-border giving and globally diversified portfolios.
- Strategic Patience and Adaptive Capital: Discover why long-term investors must lead, not follow, in a decade defined by structural change.

Optimize your strategy to navigate volatility, seize emerging opportunities, and build lasting impact in a transforming global economy.

Arijit Banik, Treasurer, **York University**

10:00 AM | SPEED NETWORKING! – MAKE MEANINGFUL CONNECTIONS

Grow your network by meeting like-minded individuals to share your latest ideas and projects with:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a **fun and agile fashion**.
- **Join a community** of institutional investment experts and gain invaluable support.

10:15 AM | INDUSTRY EXPERT: BUILDING RESILIENT PORTFOLIOS IN A VOLATILE GLOBAL LANDSCAP

Safeguard Long-Term Capital While Meeting Near-Term Funding Needs

Institutional investors are facing a complex and rapidly evolving investment environment driven by rising bond yields, shifting fiscal policies, and increased market concentration. The stakes are high. Create a practical roadmap to build resilient, mission-aligned portfolios amid uncertainty. Develop a blueprint to:

- Assess how macroeconomic trends may impact future returns across asset classes.
- Evaluate whether continued reliance on a narrow set of outperforming equities poses long-term risks.
- Identify how to preserve capital while staying agile in a shifting policy and geopolitical environment.

Bolster resilience and long-term performance to mitigate emerging risks and enhance diversification.

FULL AGENDA

Day 1 – Tuesday. March 10, 2026

10:45 AM — C-SUITE EXCLUSIVE PANEL: BECOMING INVESTMENT READY

Laying the Foundation for Endowment Growth

For non-profits and foundations new to investing, taking the first steps toward building and managing an endowment can be daunting. Establish robust governance, develop an investment policy statement (IPS), choose the right investment partners, and build internal capacity to steward funds responsibly. Adopt best practices to:

- Understand the roles and responsibilities of board members, finance committees, and staff in overseeing investments.
- Develop a clear, mission-aligned IPS that outlines objectives, risk tolerance, asset allocation, and spending policies.
- Evaluate, select, and manage relationships with investment advisors, managers, and consultants.

Improve your organization's investment readiness to avoid setbacks and build a sustainable path toward long-term growth.

11:15 AM — EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest **institutional investment strategies** and strategies with our industry-leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

11:45 AM — FIRESIDE CHAT: OUTSOURCED EXPERTISE

Position Your Organization to Fully Capitalize on the Benefits of an Outsourced Chief Investment Officer (OCIO) Model

Discover how partnering with an OCIO can help your organization enhance investment governance, strengthen performance, and stay mission-focused amid growing market complexity. Optimize your investment strategy while aligning with your mission and stakeholder priorities. Master the success factors to:

- Free up internal resources to better serve donors, beneficiaries, and long-term goals.
- Improve decision-making with expert guidance on complex strategies like impact investing and private markets.
- Navigate volatility with confidence to build greater resilience in uncertain economic environments.

Amplify the OCIO approach to align with your organization's unique investment goals and mission. .

12:15 PM — FIRESIDE CHAT: INDIGENOUS-LED PROSPERITY

Inclusive Capital and Nation-Building Through Community Investment

Unlocking long-term prosperity requires more than capital, it demands partnerships grounded in respect, reconciliation, and shared opportunity. Explore the critical role of foundations, endowments, and mission-aligned investors in supporting Indigenous entrepreneurs and community-led economic development. Take back to your office strategies to:

- Develop innovative funding models and investment readiness strategies.
- Shift from transactional support to transformative collaboration.
- Embed equity, reconciliation, and Indigenous leadership into impact portfolios.

Advance reconciliation and shared prosperity by embedding equity, respect, and Indigenous leadership across every investment portfolio.

Relay Tangie, VP, Development & Finance, **Indigenous Prosperity Foundation**

12:45 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 **customer experience colleagues**.

1:45 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 — INDUSTRY EXPERT: LONG-TERM VISIONS & SHORT-TERM FUNDING DEMANDS

Position Your Organization to Fully Capitalize on the Benefits of an Outsourced Chief Investment Officer (OCIO) Model

While endowments and foundations typically invest with a long-term horizon, short-term funding requirements for operations, grants, and programs can create challenges in effective portfolio management. Source your plan of action by:

- Balancing the protection of long-term capital with meeting immediate funding needs.
- Clearly articulating funding needs during periods of economic downturn or heightened market volatility.
- Avoiding the liquidation of assets at suboptimal times.

Adapt your investment approach to manage both long-term objectives and short-term funding demands with confidence and precision.

FULL AGENDA

Day 1 – Tuesday. March 10, 2026

2:30 PM

TRACK 1: LARGE FOUNDATIONS, ENDOWMENTS, & NOT-FOR-PROFITS

PRESENTATION: FROM MISSION TO METRICS

Integrating Finance, Risk, and Values in Mission-Driven Organizations

Mission-driven organizations are increasingly expected to deliver measurable impact while managing financial complexity, operational risk, and stakeholder expectations. Strengthen your financial infrastructure to support long-term mission delivery. Source your plan of action by:

- Integrating risk management and operational efficiency while upholding core values.
- Aligning finance and fundraising to navigate uncertainty and inspire donor confidence.
- Cultivating leadership teams that blend business acumen with a purpose-driven culture.

Master alignment between operations and mission to lead with clarity and deliver meaningful impact in a results-driven world.

Tim D'Souza, VP, Finance & Business Operations**, Diabetes Canada**

TRACK 2: MID-TO-SMALL SIZE FOUNDATIONS, ENDOWMENTS, & NOT-FOR-PROFITS

CASE STUDY: BALANCING MISSION AND RETURNS

Advancing Impact Through Mission-Related Investing (MRI)

Foundations are increasingly called to ensure that their investments reflect their values, not just their financial goals. But how can leaders balance fiduciary duty with bold, mission-driven investing? Navigate the evolving landscape of mission-related investing (MRI). Create a roadmap to:

- Align mission-driven investments with long-term financial performance.
- Measure and report on social and environmental impact with accuracy.
- Balance risk, return, and mission by applying best practices from community foundations.
- Implement or expand MRI strategies within endowment or foundation portfolios.

Advance investment approaches that generate measurable social and environmental impact while achieving competitive financial returns.

Dominique Jones, Executive Director**, The County Foundation**

3:00 PM

TRACK 1: LARGE FOUNDATIONS, ENDOWMENTS, & NOT-FOR-PROFITS

INDUSTRY EXPERT PANEL: RESPONSIBLE & VALUES-BASED INVESTING

Navigating ESG and Mission Alignment in a Shifting Landscape

As ESG frameworks evolve and political headwinds in the U.S. increasingly shape the global investment environment, Canadian foundations and non-profits must rethink how to align their portfolios with mission and values. Navigate this complex and politically charged space while staying true to your organizational purpose. Adopt best practices to:

- Understand the key distinctions between ESG, socially responsible investing (SRI), impact investing, and mission alignment and how each applies to Canadian non-profit portfolios.
- Examine how U.S. political shifts and global regulatory changes are influencing ESG investing and what Canadian institutions should watch for.
- Integrate values-based investing without compromising fiduciary responsibilities or portfolio performance.

Align your investment strategy with your organization's mission and values with practical tools, investment policies, and governance approaches .

TRACK 2: MID-TO-SMALL SIZE FOUNDATIONS, ENDOWMENTS, & NOT-FOR-PROFITS

INDUSTRY EXPERT PANEL: PRIVATE EQUITY UNLOCKED

Navigating Market Dynamics and Capitalizing on Emerging Opportunities

Private equity remains the most popular alternative investment strategy and continues to attract new capital. In an era defined by macroeconomic and political uncertainty, high valuations, and increased competition, the pressure is on to deploy capital. New approaches and strategies are emerging as the industry explores opportunities both within and beyond the traditional private equity model. Achieve a step-by-step action plan to:

- Gain a comprehensive overview of the evolving private equity market.
- Identify key trends and emerging opportunities in the private equity space.
- Explore the outlook and strategic priorities for 2026.

Transform your private equity strategy to enhance investment performance and unlock new avenues for growth.

FULL AGENDA

Day 1 – Tuesday. March 10, 2026

3:30 PM | **NETWORKING BREAK & EXHIBITOR LOUNGE: CONSULT INDUSTRY EXPERTS**

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

4:30 PM | **CLOSING KEYNOTE: OPTIMIZING MANAGER RELATIONSHIPS**

Driving Performance Through Strategic Alignment

Beyond the initial selection process, the real value in working with external managers lies in building strong, aligned, and performance-driven partnerships. Move beyond transactional relationships to create enduring, mission-aligned collaborations with money managers. Take away specific solutions to:

- Develop long-term manager relationships that reflect your organization's values and goals.
- Engage managers in strategic conversations around impact, transparency, and accountability.
- Establish governance practices that promote consistent communication, performance tracking, and periodic re-evaluation.
- Identify red flags and pivot when a manager no longer aligns with your strategy.

Enrich existing manager relationships to ensure they remain an asset, not a liability, to your portfolio and mission.

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.

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** by scanning your badge at our exhibitor booths.
- 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 2**

FULL AGENDA

Day 2 – Wednesday, March 11, 2026

7:45 AM | NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **institutional investment 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: 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 identify high-growth opportunities and invest using fewer resources. Create a roadmap to:

- Identify gaps in your capacity and knowledge and determine how to leverage volunteers to reduce resource consumption.
- Increase standardization to clearly define and achieve your goals.
- Align your investment process with your mission values.

Advance your policy standardization to reduce resource consumption and improve investment success.

9:30 AM | C-SUITE POWER SESSION: STRATEGIC LEADERSHIP & GOVERNANCE

Unlock Growth, Amplify Impact, and Fortify Your Legacy

As a C-Suite leader, your ability to architect a strong leadership team and governance structure is pivotal, not just for today's operations, but for the long-term strength and sustainability of your foundation. Elevate your organization's endowment, increase mission-aligned impact, and leave a legacy of growth and resilience. Adopt best practices to:

- Align strategic leadership and governance to drive unified progress toward long-term objectives.
- Position your foundation as a catalyst for systemic change by fostering strategic partnerships and cross-sector alliances.
- Leverage the expertise of top-tier external investment managers to protect and grow purchasing power, ensuring financial resilience.

Amplify your team's effectiveness and governance to drive mission-aligned impact, strengthen resilience, and secure a lasting legacy.

Christy Holtby, VP, Philanthropy, **Alberta Cancer Foundation**

Bruce MacDonald, CEO, President, **Imagine Canada**

10:00 AM | INDUSTRY EXPERT: MASTERING THE OUTSOURCED CIO PARTNERSHIP

Outsourcing the CIO Role: Fundamentals for Ensuring a Winning Partnership

Outsourcing the CIO role is increasingly popular as endowments and foundations seek sophisticated investment expertise to maximize the value of their investments. By shifting some authority for investment decisions to external providers, organizations can ease the challenge of balancing fiduciary responsibilities with investment management. Develop a blueprint to:

- Select the right third-party advisor to partner with.
- Implement best practices for smooth execution.
- Identify key elements for a successful OCIO program.

Optimize your outsourced CIO program by focusing on clear communication, governance structures, and essential components that contribute to a thriving investment strategy.

10:30 AM | ROUNDTABLES -- DISCOVER THOUGHT-PROVOKING IDEAS

Roundtable 1: Assets Under Management of <$5M

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

- **Labour Shortages:** Doing more with fewer people.
- **Resource Constraints:** Navigating financial markets while keeping costs down.
- **Frameworks:** Building structured plans to streamline due diligence.

Roundtable 2: Assets Under Management of $5M - $550M

As foundations get larger, increased engagement between your managers, OCIOs, RIAs, and investment committees is essential to ensure due diligence and risk management are carried out effectively. Join your colleagues to collaborate on solutions to these issues. Master the success factors to:

- **Regulatory Compliance:** Assess the new disbursement quotas.
- **Investment Styles:** Evaluate in-house vs. OCIO set-ups.
- **ESG Investing:** Review the latest sustainable investment trends.

Roundtable 3: Assets Under Management of $550M+

As larger foundations become more established, developing a sophisticated understanding of investments with your committees and staff is critical. Grasp the nature of each asset class so you can contribute to your foundation's investment success. Walk away with an action plan on:

- **Asset Allocation:** Stress-test each asset class and your total portfolio.
- **Wealth Preservation:** Protect your investments against inflation.
- **Risk Management:** Identify previously hidden risks to safeguard your assets.

FULL AGENDA

Day 2 – Wednesday, March 11, 2026

11:15 AM — EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest **institutional investment strategies** and strategies with our industry-leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

12:00 PM — SPOTLIGHT SESSION: BRIDGING CAPITAL AND IMPACT FOR SUSTAINABLE CHANGE

Maximizing Mission, Managing Risk, and Mobilizing Capital for Change

Mission-aligned investing is no longer a niche strategy, it's a necessity. As foundations and endowments increasingly seek to generate measurable social and environmental impact alongside financial returns, Transition from intention to execution in your impact investing journeys by:

- Design an Impact-Aligned Portfolio and aligning investment decisions with organizational values without sacrificing long-term performance.
- Activate Capital for Systems Change by advancing equity, climate action, Indigenous reconciliation, and other core mission goals.
- Build Cross-Sector Partnerships and collaborate with innovators, communities, and fund managers to amplify both impact and scale.

Develop a Strategic Framework by understanding the governance, metrics, and stakeholder engagement tools needed to embed purpose into every layer of your investment strategy.

Wayne Miranda, Director, Social Finance & Impact Investing, **Definity Foundation**

Alana Scott, CEO, Blue Rose Foundation

12:30 PM — PANEL: STRATEGIC COLLABORATION IN IMPACT INVESTING

Align Goals, Capital, and Community Outcomes

Effective impact investing requires more than capital; it demands shared vision, strategic alignment, and trust among diverse partners. Co-create successful outcomes through deeper collaboration in social finance models, including social impact bonds and pay-for-success programs. Master the success factors to:

- Bridge the gap between impact goals and financial returns by setting shared success criteria across partners.
- Engage policy makers, community stakeholders, and investors with different mandates and time horizons.
- Design social impact transactions that account for diverse motivations, from measurable outcomes to return on investment.
- Ensure inclusive investment models that centre community voice and benefit underserved populations.

Perfect collaborative deals to be both financially sustainable and socially transformative.

1:00 PM — INDUSTRY EXPERT: DISBURSEMENT QUOTA DEEP DIVE

Navigating CRA Rules and Granting Compliance

Recent updates to Canada Revenue Agency (CRA) regulations are reshaping how foundations approach their granting strategies. Navigate through current disbursement quota (DQ) rules, including increased minimum spending requirements, and explore opportunities and compliance risks related to granting to non-qualified donees. Take back to your office strategies to:

- Uncover what the latest CRA changes mean for your annual spending obligations and how they affect your overall endowment strategy.
- Gain clarity on new rules that allow granting to non-qualified donees, including due diligence requirements, documentation standards, and risk mitigation.
- Discover how smaller organizations can meet DQ requirements without overextending resources, including options for collaborative granting and policy updates.

Improve your foundation's readiness by anticipating CRA developments and preparing for continued regulatory shifts in the charitable landscape.

1:30 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 **institutional investment colleagues**.

2:00 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 exclusive content.

2:30 PM — PRESENTATION: UNLOCKING LONG-TERM VALUE

Leveraging Alternatives to Advance Endowment Goals

With market volatility and inflationary pressures challenging traditional portfolios, endowments and foundations are increasingly turning to alternative investments to meet their financial and mission-driven goals. Align your alternatives with your organization's risk tolerance, liquidity needs, and long-term vision. Source practical tips to:

- Evaluate the strengths and limitations of private equity, real assets, hedge funds, and other alternative strategies.
- Optimize your asset mix by striking the right balance between traditional investments and alternatives.
- Build smarter partnerships with GPs and service providers to improve transparency, alignment, and outcomes.

Heighten your portfolio's impact by strategically integrating alternatives to support both financial and mission-driven objectives.

FULL AGENDA

Day 2 – Wednesday, March 11, 2026

3:00 PM

TRACK 1: INVESTMENT STRATEGY & MISSION INTEGRATION

INDUSTRY EXPERT: NAVIGATING NEW TRENDS

Tech and AI in Finance: How it Can Supercharge Your Investment Process

It's well known that tech and AI are set to play a major role in investing. What exactly will that role be in the short, medium, and long term? Embrace one of the industry's fastest growing trends and enhance your due diligence. Adopt best practices to:

- Achieve real tech and AI adoption by identifying where it can significantly boost productivity in the next year.
- Reveal how AI can drive portfolio valuation.
- Determine where your money managers are using AI to assess whether a quantitative approach aligns with your strategy.

Transform your investment process to maximize efficiency, enhance decision-making, and drive better returns.

TRACK 2: OPERATIONALIZING ESG & IMPACT

INDUSTRY EXPERT: CUT THROUGH THE NOISE

Effectively Valuing Your ESG Opportunities

Identifying where you want to make an impact and how to measure that impact is the cornerstone of environmental, social, and governance (ESG) investing. This process, however, can be complex. Heighten your ability to accurately assess ESG opportunities by focusing on key metrics and disclosures. Master the success factors to:

- Refine the types of disclosures you request to gain a clearer understanding of risks and opportunities.
- Bolster your understanding of key ESG metrics, including net-zero targets, GHG emissions, and DEI goals, and what they reveal.
- Align these metrics with your mission, enabling you to "screen in" investments that proactively benefit society.

Achieve a comprehensive understanding of ESG investment opportunities to maximize positive societal impact while optimizing financial returns.

3:30 PM — EXHIBITOR LOUNGE: CONSULT INDUSTRY EXPERTS

- **Source invaluable insights** and experience the next level of institutional 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

TRACK 1: INVESTMENT STRATEGY & MISSION INTEGRATION

CASE STUDY: MOBILIZING YOUR CAPITAL

Removing Barriers to Your Cause

Getting fund managers to prioritize your specific investment area can be challenging, especially when the focus is niche or there are barriers to entry. Overcome these obstacles and elevate your cause to secure more funding in your area. Take away specific solutions to:

- Transform your relationship with your fund manager to ensure investments are directed precisely where you need them.
- Align your investment committee with your mission statement, eliminating any ambiguity.
- Learn from a real estate case study on navigating technical and legislative barriers to sustainable buildings without compromising returns.

Optimize innovation and impact, even in complex investment landscapes, to drive sustainable growth and achieve long-term financial and social returns.

TRACK 2: OPERATIONALIZING ESG & IMPACT

CASE STUDY: ESG & IMPACT INVESTING MANDATES

How to Strategically Integrate ESG

The demand for foundation and endowment portfolios to incorporate environmental, social, and governance (ESG) criteria is growing, alongside the need for impact investing strategies that generate both financial returns and social and environmental benefits. Create a roadmap to:

- Integrate ESG and impact investments into portfolios without compromising returns by employing sophisticated analysis.
- Improve the quality and standardization of ESG metrics, addressing ongoing issues in data consistency.
- Enable trustees to navigate the challenges of balancing ESG priorities with fiduciary duties.

Improve the quality and consistency of ESG metrics to drive measurable social and environmental impact while maintaining strong financial performance.

FULL AGENDA

Day 2 – Wednesday, March 11, 2026

4:30 PM	CLOSING KEYNOTE: MAXIMIZING RETURNS & MANAGING RISK

A Strategic Approach to Alternatives and Liquidity for Endowments and Foundations

As foundations and endowments increasingly allocate capital to alternative investments, such as private equity, venture capital, and real assets, the potential for enhanced returns grows. But so does the complexity of managing liquidity, transparency, and alignment with mission goals. Harness the upside of alternatives while protecting your organization's financial flexibility. Source your plan of action by:

- Understanding how illiquidity can impact your ability to meet operational and grant-making obligations.
- Evaluating the risk-return profile of key alternative asset classes.
- Balancing long-term growth potential with short-term liquidity needs.
- Navigating capital lock-up periods and developing proactive liquidity planning strategies.
- Making informed, mission-aligned decisions in a complex investment environment.

Bolster your alternative allocations to maximize returns while safeguarding your foundation's financial health and mission impact.

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.

5:15 PM	CONFERENCE CONCLUDES

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.

SUPER EARLY BIRD EXPIRES ON NOV 28, 2025	$1,095
REGULAR TICKET	$1,595

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 home PowerPoints and white papers addressing your biggest challenges.

ON-DEMAND ACCESS:
Conveniently rewatch any session for up to 3 months after the event.

SUPER EARLY BIRD EXPIRES ON NOV 28, 2025	$895
REGULAR TICKET	$1,295

REGISTER FOR DELEGATE PASS

Contact:
Anthony Arqueza
Delegate Sales Associate
Email: Anthony.Ar@strategyinstitute.com

GROUP RATES

Enhance your team collaboration, ROI, and industry presence with our existing group discounts for groups of 3+.
Speak with **James** about our best rates:

Email: Anthony.Ar@strategyinstitute.com

24th Annual
Foundation, Endowment & Not For Profit Investment Summit

MARCH 10 – 11, 2026
HYATT REGENCY TORONTO