

Foundation, Endowment & Not For Profit Investment Summit

Post Event Report

March 5 & 6, 2025

Hyatt Regency Toronto, Canada



Brought to you by:

**STRATEGY
INSTITUTE**

The Foundation & Endowment Investment (FENI) Summit is where Canada's leading institutional investors, foundation executives, and philanthropic finance leaders unite to shape the future of purpose-driven investing.

Foundation, Endowment, & Not for Profit Investment 2025 brings together decision-makers from foundations, endowments, not-for-profits, and investment firms for two high-impact days focused on balancing mission and performance in an increasingly complex financial landscape. From navigating market volatility and shifting regulations to integrating ESG priorities and exploring community bonds, the Summit offers a strategic lens on how to drive both long-term returns and measurable social impact.

Anchored in today's evolving investment landscape—from market volatility and shifting regulations to ESG integration and innovative financing models—**FENI** has become the essential forum for building resilient, diversified portfolios. Through keynotes, case studies, panels, and interactive roundtables, attendees gain actionable insights into asset allocation, governance excellence, risk management, and aligning portfolios with purpose while delivering sustainable returns.

94%
of attendees are from foundations, endowment, non-profits and charities in Canada

Immerse yourself in the Foundation, Endowment, & Not for Profit Investment Experience:

[Watch the 2024 Highlight Video Here](#)



Foundation, Endowment &
Not For Profit Investment
Summit

www.foundationendowmentsummit.com

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Foundation, Endowment, & Not for Profit Investment in Numbers



115+
On-site
Attendees



44
Expert
Speakers



20+
Hours Innovative
Content



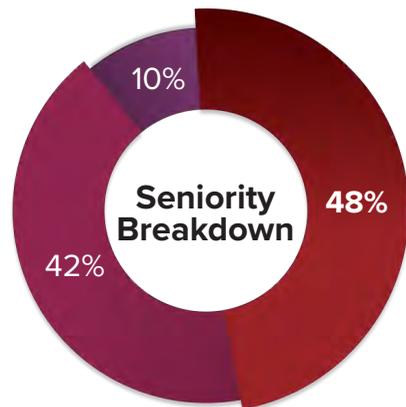
10+
Hours
Networking



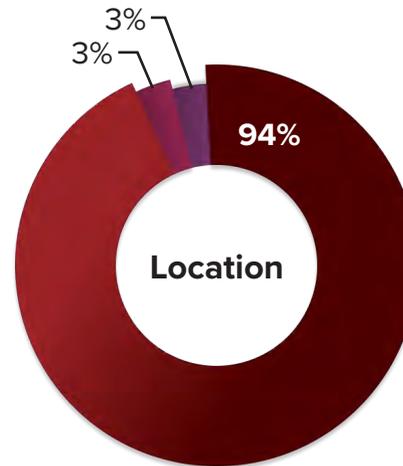
93%
Overall Attendee
Satisfaction



73%
of attendees are
CIOs, Treasurers, VPs,
Board Members or
Executive Directors

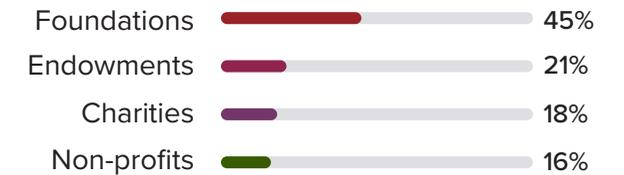


- 48% CIO/Treasurer/VP/Board Member
- 42% ED/Manager
- 10% Analyst/Specialist



- 94% Canada
- 3% United States
- 3% Other

MARKET SEGMENTS



Hear From Our Foundation, Endowment, & Not for Profit Investment Community



I would definitely rate the energy at the summit a 10 out of 10. I was very surprised at how willing people are to talk about, you know, our strategies and learn more from our thoughts on what's going on in the market and the industry. So overall, it's been great and we're excited to come back next year.

Vancity



Wonderful opportunity for networking while learning valuable information you can use tomorrow



What a lineup! UNICEF, South Saskatchewan Community Foundation, IMC—the speaker quality was exceptional. Very satisfied with the digital experience, and 90% of sessions hit home.



The FENI event brought small charities and large foundations into a shared space, which allowed Network and sustainable capacity conversation.



Schroders and CC&L delivered the technical depth I was looking for. Sessions on protecting gains and market outlooks were solid. More investing-focused content like this would make it a can't-miss event!



Very satisfied overall! Market volatility insights and Community Foundations sessions delivered real value. Central location was a bonus—this is the conference to attend!



Discover, Network, Transform



Discover

Foundation executives, endowment leaders, and institutional investment experts share real-world case studies and actionable strategies for balancing mission and performance—covering asset allocation, ESG integration, impact investing, community bonds, governance excellence, and risk management in today's volatile markets.

Network

Connect with a high-caliber community of CEOs, CIOs, treasurers, and portfolio managers through curated networking experiences—keynote panels, speed networking, interactive roundtables, exhibitor lounges, and informal meetups that spark collaboration across foundations, not-for-profits, and investment solution providers.

Transform

Learn from the changemakers shaping the future of purpose-driven finance. Whether optimizing an OCIO partnership, diversifying into private markets, advancing climate-aligned portfolios, or building resilient long-term strategies, FENI equips you with the insights, tools, and peer connections to deliver sustainable returns and lasting impact.

2025 Themes: Driving Purpose-Driven Finance with Strategy, Impact & Resilience

The 2025 Foundation & Endowment Investment (FENI) Summit brought together Canada's top foundation executives, endowment managers, and institutional investment leaders to address the defining challenges—and transformative opportunities—shaping the future of mission-aligned investing. Against a backdrop of market volatility, evolving ESG priorities, and growing donor expectations, one message was clear: achieving sustainable returns and lasting impact requires strategic governance, diversified portfolios, and purposeful capital allocation.

The insights exchanged didn't just inform—they offered a blueprint for how foundations and endowments can balance financial performance with meaningful social outcomes in an increasingly complex world.

5 Big Trends from **Foundation & Endowment Investment 2025:**

1 Aligning Purpose with Performance

Leaders shared practical approaches to integrating mission-related investments without sacrificing returns—proving that impact and profitability can go hand-in-hand with the right strategy.

2 Diversifying for Resilience

From private markets and alternative investments to community bonds and impact bonds, diversification emerged as a critical tool for weathering economic uncertainty and achieving long-term stability.

3 Governance as a Growth Driver

Strong governance structures and well-aligned OCIO partnerships were highlighted as essential for optimizing investment decisions, managing risk, and preserving endowment capital.

4 ESG & Climate-Aligned Portfolios

Sessions explored how climate considerations and ESG integration are shaping portfolio construction, opening new opportunities for impact while mitigating emerging risks.

5 Innovation in Financing Models

Case studies showcased innovative funding vehicles—including community-driven investment, nature-based solutions, and new asset allocation frameworks—that expand both mission impact and financial sustainability.

[VIEW OUR FENI CONTENT HUB](#) →

Our Speakers

[VIEW AGENDA →](#)



Eric Lascelles
Managing Director & Chief Economist
RBC



Arijit Banik
Treasurer
York University



Sevaun Palvetzian
CEO
UNICEF Canada



Angela Chapman
CEO
VGH & UBC Foundation



Dionne Broadus
National VP, Philanthropy & Impact Investing
American Heart Association



Idalin McKenzie
VP, Finance and Asset Management
YWCA Hamilton



Donna Ziegler
Executive Director
South Saskatchewan Community Foundation



Jamison Steeve
CEO
Metcalf Foundation



Sameer Chetty
Director, Finance & Operations
Saskatoon Community Foundation



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

Our Speakers

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Jeffrey Haber
Sr. Director, Finance
Commonwealth Fund



Sarah Charters
CEO
United Church of Canada



Michael (Robert) Anhorn
CEO
Canadian Mental Health
Association (CMHA) Toronto



Judy Zhu
Executive Director
Royal Columbian Hospital
Foundation



Andy Sullivan
VP, Asset Management
YWCA of Southwestern
Ontario



Meynard Wiersma
Executive Director
Christian Stewardship
Services



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



Anish Chopra
MD Portfolio Management
Corporation & Investment Committee
Lawson Fdn.



Frédéric Gauvin
President & Chief Investment
Officer
Université de Sherbrooke



Michael Cheong
CFO
United Way Greater Toronto

Our Speakers

[VIEW AGENDA →](#)



Michael Ashmore
 Chair, Finance & Investment Committee
 University of Waterloo



Adam Hicks
 Director of Finance and Strategic Initiatives
 South Saskatchewan Community Foundation



Activations and experiences to inspire and energize



Speed Networking

High-energy, timed sessions that maximize introductions — meet new peers, exchange cards, and spark quick connections.

Roundtables

Fast-paced networking rounds designed to spark valuable introductions and share fresh ideas in minutes.

VIP Breakfast, Lunch and Dinner Briefings

Meet one-on-one with leading solution providers and explore the latest data tools and technologies.

Evening Reception

Relaxed breakfast and lunch gatherings that make it easy to start meaningful conversations and build lasting connections.

2025 Attending Organizations: Advancing Purpose-Driven Investing Through Strategy & Impact

The 2025 Foundation & Endowment Investment (FENI) Summit brought together a powerful cross-section of Canada’s institutional investment ecosystem—foundations, endowments, not-for-profits, asset managers, investment consultants, and solution providers. United by a shared mission to align financial performance with meaningful social outcomes, these organizations explored practical, innovative approaches to governance, diversification, and impact investing in a rapidly evolving market.

Their participation underscores the FENI Summit’s role as Canada’s leading forum for advancing mission-aligned finance, building resilient portfolios, and shaping the future of institutional investing through insight, collaboration, and strategic leadership.

Some of the incredible organizations who joined us:

- ✓ UNICEF Canada
- ✓ Canadian Mental Health Association Toronto
- ✓ YWCA Hamilton
- ✓ South Saskatchewan Community Foundation
- ✓ VGH & UBC Foundation
- ✓ York University
- ✓ United Church of Canada Foundation
- ✓ Saskatoon Community Foundation
- ✓ Commonwealth Fund
- ✓ Royal Columbian Hospital Foundation
- ✓ YWCA of Southwestern Ontario
- ✓ Metcalf Foundation
- ✓ American Heart Association
- ✓ Surrey Hospitals Foundation
- ✓ BC College of Pharmacists
- ✓ The National Ballet of Canada
- ✓ Lawson Foundation
- ✓ Services and Housing in the Province (SHIP)
- ✓ Brique par brique
- ✓ Tapestry Community Capital
- ✓ University of Waterloo
- ✓ Georgian Bay General Hospital Foundation
- ✓ WWF-Canada
- ✓ Christian Stewardship Services
- ✓ RBC Asset Management
- ✓ Fiera Capital
- ✓ Aviva Investors
- ✓ CC&L Financial Group
- ✓ Portfolio Management Corporation
- ✓ CIDEL Asset Management Inc.
- ✓ MFS Investment Management
- ✓ Forthlane Partners
- ✓ Trans-Canada Capital
- ✓ Picton Mahoney Asset Management

Our Sponsors

Connect with the organizations shaping the future of institutional investing and impact-driven financial strategies.

These sponsors play a pivotal role in advancing portfolio performance, enabling innovative investment approaches, and fostering collaboration across Canada's foundation, endowment, and not-for-profit sectors. By supporting forward-thinking solutions and driving responsible growth, they empower institutions to maximize returns, manage risk, and create lasting social and financial impact.

Gold



Silver



Bronze



Bronze



HOW TO REGISTER?

IN-PERSON PASS

FULL TWO-DAY ACCESS:

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables, and one week of pre-event networking via our dedicated platform.

FACE-TO-FACE NETWORKING:

Connect and build valuable relationships with our audience of thought leaders.

5-STAR TREATMENT:

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location.

EXPO HALL:

Form lasting business partnerships, test drive the latest solutions, and gather exclusive content from industry-leading experts.

SPEAKER PRESENTATIONS:

Take home PowerPoints and white papers addressing your biggest challenges.

ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event.

VIRTUAL PASS

TWO-DAY LIVE STREAM ACCESS:

Tune into keynote sessions, panel discussions, and case studies with real-time Q&A from the comfort of your home.

VIRTUAL NETWORKING:

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool.

VIRTUAL EXPO HALL:

Form lasting business partnerships, test drive the latest solutions, and gather exclusive content from industry-leading experts.

SPEAKER PRESENTATIONS:

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REGISTER NOW →

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Contact:

Sam Caskey

Delegate Sales Associate

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GROUP RATES

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Email: sam.caskey@strategyinstitute.com

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\$1,095

REGULAR TICKET

\$1,595

SUPER EARLY BIRD
EXPIRES ON NOV 28, 2025

\$895

REGULAR TICKET

\$1,395

24th Annual

**Foundation, Endowment &
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MARCH 10-11, 2025 | HYATT REGENCY TORONTO