

# FUTURE-PROOFING FOUNDATIONS: WHERE CAPITAL MEETS PURPOSE

[REGISTER NOW](#) ↗

24th Annual

Foundation, Endowment &  
Not For Profit Investment  
Summit

MARCH 10 - 11, 2026 | HYATT REGENCY TORONTO

[WWW.FOUNDATIONENDOWMENTSUMMIT.COM](http://WWW.FOUNDATIONENDOWMENTSUMMIT.COM)

#FENI2026



# CONTENTS

**01. MESSAGE FROM THE PRODUCER**

**03. WHY ATTEND?**

**05. AGENDA AT A GLANCE**

**07. TESTIMONIALS**

**09. FULL AGENDA**

**02. INTRO: SHAPING THE FUTURE OF INSTITUTIONAL INVESTMENT**

**04. NETWORK AND HAVE FUN**

**06. WHO ATTENDS?**

**08. SPEAKER LINEUP**

**10. HOW TO REGISTER**

# 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](mailto: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 Canada**.
- ▶ 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.

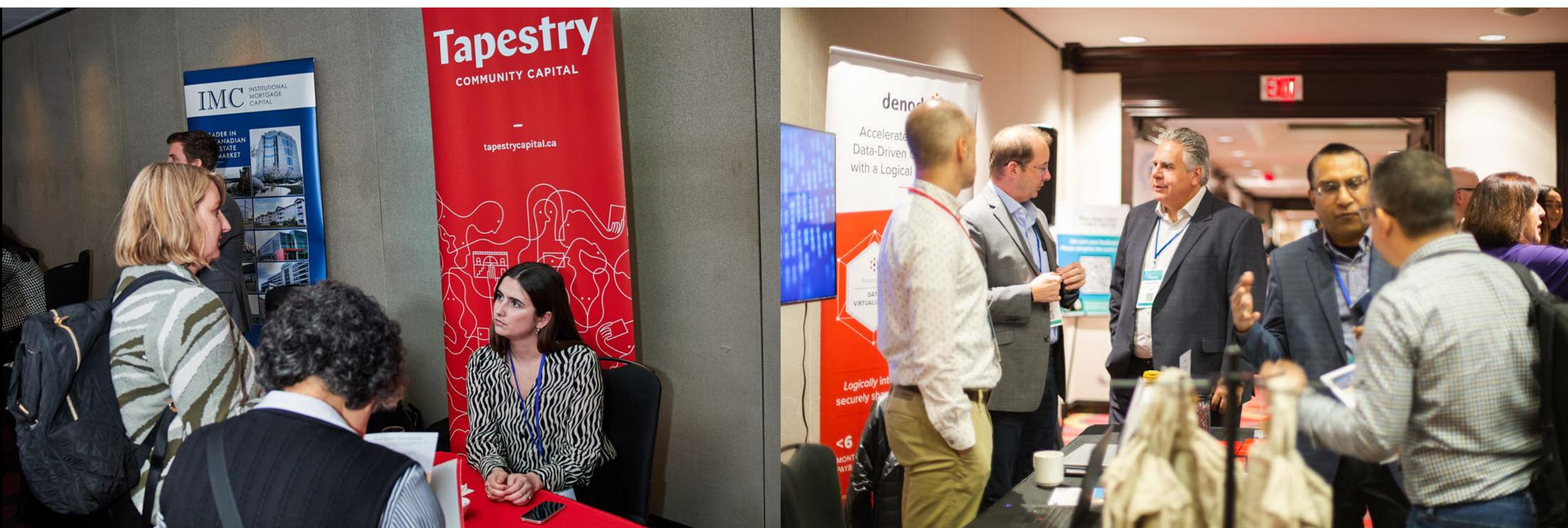


## HAVE FUN

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.



# 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!”



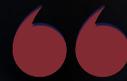
“Excellent, knowledgeable speakers covering relevant topics — app was super useful, and updates on market volatility and disbursement changes were spot on!”



“Great networking with insightful panels on asset allocation and risk.”



“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.”



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



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



# 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.



**Jennifer Lee**  
Senior Economist and  
Managing Director  
Economics  
BMO Capital Markets



**Marc Gauthier**  
Treasurer, Chief  
Investment Officer  
Concordia University



**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



**Rashid Javed**  
Chief Operating Officer  
Toronto Foundation



**Bruce MacDonald**  
CEO, President  
Imagine Canada



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



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



**Emily Yano**  
Director, Finance  
Alberta Cancer  
Foundation



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



**Alana Scott**  
CEO  
Blue Rose Foundation



**Subash Biswal**  
Chief Financial and  
Business Officer  
Indigenous Works



**Yulena Wan**  
VP, Operations &  
Finance  
Hamilton Foundation



**Gary Béliveau**  
Director of Finance  
Foundation CHU  
Sainte-Justine



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



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



**Keegan Varella**  
CFO & Head of  
Technology  
Peel Children's Aid  
Society

## 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.

**Joelle Faulkner**, CEO, **AreaOne Farms**

## 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**

**Koudjo Oni**, Director of Revenue, **Cancer Research Society**

**Alex Letko**, Regional Manager, Central Canada, Portfolio Manager, **Letko Brosseau & Associates** MODERATOR

## 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.*

**Jennifer Lee**, Senior Economist and Managing Director Economics, **BMO Capital Markets**

**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.*

**Andrew Sweeney**, Managing Director, **PH&N Institutional**

## 10:45 AM CASE STUDY: ASSET ALLOCATION IN VOLATILE TIMES

### Navigating the Changing Equity Market Landscape

In an investment landscape defined by rapid change and rising complexity, understanding today's equity markets has never been more critical. Market leadership is narrowing, geopolitical tensions are influencing risk perceptions, and performance patterns across regions, sectors, and styles continue to evolve. Against this backdrop, both active managers and asset allocators are being challenged to adapt their approaches. This session will set the stage by outlining the forces reshaping global equities and exploring how investors can position their portfolios to navigate and potentially capitalize on this new environment. Join us to hear:

- An **overview of the equity market environment**, including recent equity performance across regions, sectors, and styles, along with an exploration of equity market concentration and dominant themes;
- A review of **challenges being faced by active equity managers** due to narrowing market leadership, and a glimpse at their performance; and
- A perspective on **how to navigate the new equity landscape**, which is characterized by elevated geopolitical risk combined with heightened market concentration, prompting investors to rethink how their equity allocations are structured and diversified.

**Caroline Grandoit**, Senior Managing Director and Lead Portfolio Manager, Total Portfolio Solutions, **Fiera Capital**

**Sarah Aves**, Head of Institutional Clients, Canada, **Fiera Capital** MODERATOR

## 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

### TRACK 1:

#### 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.*

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

**Kim Desmarais**, Senior Advisor in Responsible Investment, **Desjardins Global Asset Management**

**Jeffrey Haber**, Senior director, Finance, **The Commonwealth Fund** MODERATOR

### TRACK 2:

#### FIRESIDE: INNOVATIVE CLIMATE INVESTING IN PUBLIC & PRIVATE MARKETS

Innovative climate investing requires moving beyond conventional approaches in both public and private markets. Carbon footprint based public market strategies and traditional cleantech private equity or venture capital allocations often fall short of delivering the depth of climate outcomes investors seek. This fireside chat challenges prevailing assumptions and explores how an impact investing lens can unlock differentiated opportunities, stronger additionality, and more effective capital deployment across asset classes. Join us to explore:

- Why generalist climate investing approaches in public and private markets often fail to deliver meaningful climate outcomes.
- How innovation in investment strategy and product design is essential to achieving both financial performance and real world environmental impact.
- Impact investing as a lens to identify overlooked climate solutions, reduce competition for capital, and access more attractive pricing.
- The comparative merits of public versus private markets in terms of breadth versus depth of impact, scalability, and additionality.
- Gain practical insights to refine your climate investment strategy and better align capital with measurable environmental outcomes.

**Michel Brutti**, Board member & president, Investment Committee, **Clear Skies Investment Management**

**Pierre-Laurent Macridis**, Director of Financial Innovation, **Greater Montreal Climate Fund**

12:15 PM

**TRACK 1:**

**FIRESIDE CHAT:**

**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**

**Joelle Faulkner**, CEO, **AreaOne Farms**

MODERATOR

**TRACK 2:**

**EXCLUSUVE SESSION: 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 and allocate assets appropriately in volatile times. 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.*

**Alana Stott**, CEO, **Blue Rose Foundation**

**Jeffrey Haber**, Senior director, Finance, **The Commonwealth Fund**

MODERATOR

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: TOTAL PORTFOLIO SOLUTION**

“Just because something is good, doesn’t mean it’s good enough.” The future is not a better strategic asset allocation model. It’s a different architecture altogether that requires a new mindset.

As asset owners, create better alignment between their objectives and their investment portfolio and in doing so achieve their goals with greater certainty. This will be a wide-ranging discussion covering topics such as:

- Why stocks and bonds are not enough, the role of alternative investments in goal-based portfolio construction
- Why legacy risk models are becoming obsolete in a world of multi-asset multi-strategy portfolios and what to do about it
- A look at the dramatic shift in capital allocation that has been occurring over the past 20 years as investors seek to make their money work harder and smarter.

**Robert Wilson**, Head of Innovation and Portfolio Strategies, **PICTON Investments**

2:30 PM

**INDUSTRY EXPERT:**

**Ignite your committee's effectiveness**

This session is designed to energize your foundation’s committee. Discover how every member, regardless of their experience, can drive collaboration, and unlock the group’s full potential. It will explore the power of emotional intelligence, with practical strategies to strengthen relationships, enhance decision-making, and where everyone benefits. Join us and transform your committee dynamics and make a lasting difference to your foundation.

**Peter Muldowney**, Head of Institutional & Multi-Asset Strategy (and potentially a Foundation representative to share their experiences), **CC&L**

3:00 PM

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

**PANEL: 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.*

**Keegan Varella**, CFO & Head of Technology, **Peel Children's Aid Society**

**Bill Barrable**, CEO, **Prax Institute**

**Joelle Faulkner**, CEO, **AreaOne Farms**

MODERATOR

**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**

**Stephanie Tsui**, Chief Sustainability Officer, Portfolio Manager, Partner, **Genus Capital Management**

**Jeffry Haber**, Senior director, Finance, **The Commonwealth Fund**

MODERATOR

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.

4:00 PM

**DIFFERENTIATED ALPHA: SYSTEMATICS, SUSTAINABILITY & THE POWER OF BETTER SIGNALS**

**How Systematic Investors Can Integrate Sustainability Without Sacrificing Risk Discipline.**

As sustainability data broadens, regulations diverge, and market concentration increases, investors face a key question: how to incorporate financially material sustainability signals into equity portfolios without creating unwanted factor exposures. This session outlines a disciplined, systematic framework for building a resilient, sustainable equity core using proprietary, rules-based insights that highlight transition opportunities while managing downside risk. Key takeaways:

- Why conventional ratings often overlook financially material risks
- How to quantify opportunity and corporate resilience
- How to incorporate sustainability signals while controlling tracking error and factor exposure
- Practical lessons for long-term allocators seeking greater equity resilience

**Christine Cappabianca**, Portfolio Manager, **IMPAX ASSET MANAGEMENT**

**Carleen Dehaney**, Principal, **FXO Consulting** MODERATOR

4:30 PM

**CLOSING KEYNOTE: 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.*

**Sharon Avery**, President & CEO, **Toronto Foundation**

**Andrew Torres**, Investment Committee Chair, **Toronto Foundation**

**Chris Barber**, Deputy Co-CIO of OCIO solutions, **RockCreek**

**Carleen Dehaney**, Principal, **FXO Consulting** MODERATOR

# FULL AGENDA

Day 1 – Tuesday, March 10, 2026

## 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 SPOTLIGHT PANEL:

### Evolving Investment Practices for Hospital Foundations

This session brings together senior decision-makers from Canadian hospital foundations to explore best practices, challenges, and opportunities in adopting sustainable investment practices to better align their investment practices with mission, climate resilience, and long-term financial stewardship.

Panelists will share lessons from their experience and from their involvement in the Healthy Capital initiative (funded by the Trottier Family Foundation and led by the Canadian Coalition for Green Health Care), including strategies for integrating responsible investment into foundation governance and balancing financial performance with social and environmental impact.

Attendees will gain actionable insights to advance their practices.

**Marc Gauthier**, Treasurer, Chief Investment Officer, **Concordia University**

**Gary Béliveau**, Director of Finance, **Foundation CHU Sainte-Justine**

**Ayo Olatunji**, Director, Responsible Investing, **Canadian Medical Association**

## 9:45 AM C-SUITE POWER SESSION

As donor interests evolve, your ability to be responsive to shifting interest, diligence and return on investment can position your organization uniquely in the philanthropic market. In this session we will dive into models of Strategic Philanthropy, Venture Philanthropy, Investment Management and Endowments to create lasting impact. Elevate your organization's unrestricted revenue, 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**

**Emily Yano**, Director, Finance, **Alberta Cancer Foundation**

## 10:15 AM COFFEE BREAK & 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.

## 10:45 AM INDUSTRY EXPERT: WHERE ESG MEETS PERFORMANCE: THE CASE FOR MULTI-RESIDENTIAL INVESTING

### How Investing In Housing Can Deliver Stable, Inflation-resilient Returns While Addressing Pressing Social and Environmental Challenges

Foundations and endowments face the challenge of aligning mission with long-term financial sustainability. Multi-residential real estate offers a unique opportunity to do both. Adopt best practices to:

- Strengthening communities, improving housing quality, and reducing environmental impact without compromising portfolio performance with role of value-add multi-residential strategies in.
- Building active ownership, ESG integration, and disciplined investment processes support cash-flow stability and risk management
- Building scalable social impact, making multi-residential a compelling core allocation for mission-driven institutional investors.

**Ali Katz**, Managing Partner, Head of Institutional Sales, **Hazelview Investments**

**Colleen Krempolec**, Managing Partner, Head of Sustainability and Brand, **Hazelview Investments**

**Jessica Barford**, Associate, Institutional & Consultant Relations, **Hazelview Investments** MODERATOR

## 11:15 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:

# FULL AGENDA

Day 2 – Wednesday, March 11, 2026

- **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.

## 12:00 PM FIRESIDE: REDEFINING FOUNDATION INVESTING FOR MISSION, IMPACT & LONG-TERM CHANGE

### Reimagine Your Investment Strategies and Embrace a Truly Mission-First Mindset.

Challenge the traditional divide between granting and investing. Use community loans, private debt and equity, ESG-driven public market strategies, and shareholder activism to create meaningful, measurable social change. Harness the full power of your endowments to generate both financial returns and community impact without compromise.

Beyond the 5% Rule: Why grant making alone can't meet today's social challenges and why mission-aligned investing matters now more than ever.

- The 100% Commitment: Align your entire portfolio with mission through impact investments and responsible investing.
- Catalytic Capital in Action: Generating transformative local impact through community loans, private debt, and equity investments.
- ESG With Teeth: How shareholder activism, exclusion policies, ESG analysis, and proxy voting amplify social impact in public markets.

*Build an investment model for the future with governance, risk management, cultural change, and board engagement needed to make mission-aligned investing work.*

**Yulena Wan**, Chief Operating / Financial Officer, **Hamilton Foundation**

**Michael Beaupré**, Managing Director, Client Relationships, **IMC**

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

## 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 **institutional investment 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 exclusive content.

## 2:00 PM INDUSTRY EXPERT:

### Leveraging Alternatives to Achieve Your Organization's Investment Objectives

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

- Evaluating the strengths and limitations of private equity, real assets, hedge funds, and other alternative strategies.
- Understanding the two primary roles alternatives can play in a portfolio: return enhancement and risk reduction.
- Optimizing your asset mix by striking the right balance between traditional investments and alternatives.

*Increase your portfolio's impact and longevity by strategically integrating alternatives to support financial objectives.*

**Wayne Kozun**, Co-Chief Investment Officer, **Forthlane Partner**

**Anthony Berg**, Senior Investment Analyst, **Forthlane Partner**

## 2:30 PM FIRESIDE: DISBURSEMENT QUOTA DEEP DIVE

In this session, you'll hear the latest from Imagine Canada and the work that it does in understanding trends in the sector and what's happening at a federal government level.

Specifically, takeaways from this session will include:

- The latest on data that examines the impact of the disbursement quota in anticipation of a 2027 Federal Government review
- The latest research and information from Imagine Canada in looking at areas affecting charities and non-profits
- Information on the long-term trend affecting wealth transfer and the changing demographics of the donors who have supported social good for decades.

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

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

## 3:00 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**

## 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 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.*

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

## 4:30 PM CLOSING KEYNOTE PANEL: 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.*

**Subash Biswal**, Chief Financial and Business Officer, **Indigenous Works**

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

## 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.

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.

REGULAR TICKET

\$1,395

### REGISTER FOR DELEGATE PASS

#### Contact:

**Anthony Arqueza**

Delegate Sales Associate

Email: [Anthony.Ar@strategyinstitute.com](mailto: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](mailto:Anthony.Ar@strategyinstitute.com)

24th Annual

**Foundation, Endowment & Not For Profit Investment Summit**

**MARCH 10 – 11, 2026**  
HYATT REGENCY TORONTO