

25th Annual

Foundation, Endowment & Not For Profit Investment Summit



The only Canadian event dedicated exclusively to
foundation, endowment and not-for-profit investors

March 10-11, 2027



Build Valuable Relationships and Increase Your Assets Under Management

- The **25th Annual Foundation, Endowment and Not for Profit Investment Summit** is part of our portfolio of institutional investor conferences.
- This is an **in-person event** featuring face-to-face meetings, breakout streams and networking sessions. The conference will also be **streamed virtually** for increased reach and higher engagement.
- FENI attracts **senior investors** actively looking for solutions to help protect and increase their capital.
- Our **cutting-edge event app** enables you to scan leads in real time, schedule meetings onsite, network with our virtual audience and more.



Key Event Metrics



Attendees with AUM ranging from **\$30M** to **\$5B**



78% of attendees are CIOs, Treasurers, VPs, Board Chairs/Members or Directors



96% of attendees are from foundations, endowments, non-profits or charities in Canada



Top Reasons Our Delegates Attend



Source new asset classes



Discover new asset managers



Gain best practices and investment strategies



Connect with current asset managers



Stay on top of investment trends and innovations



Engage with peers face to face and virtually

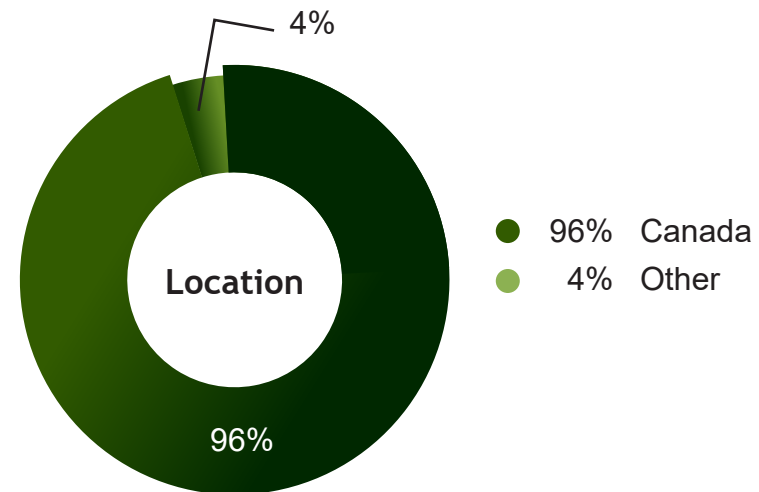
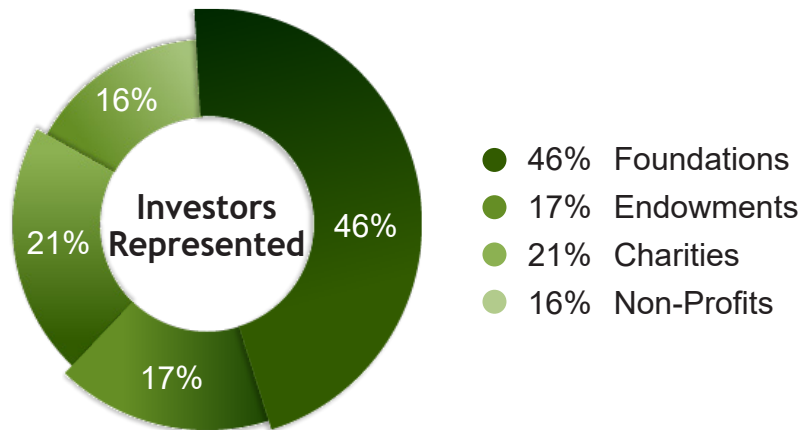
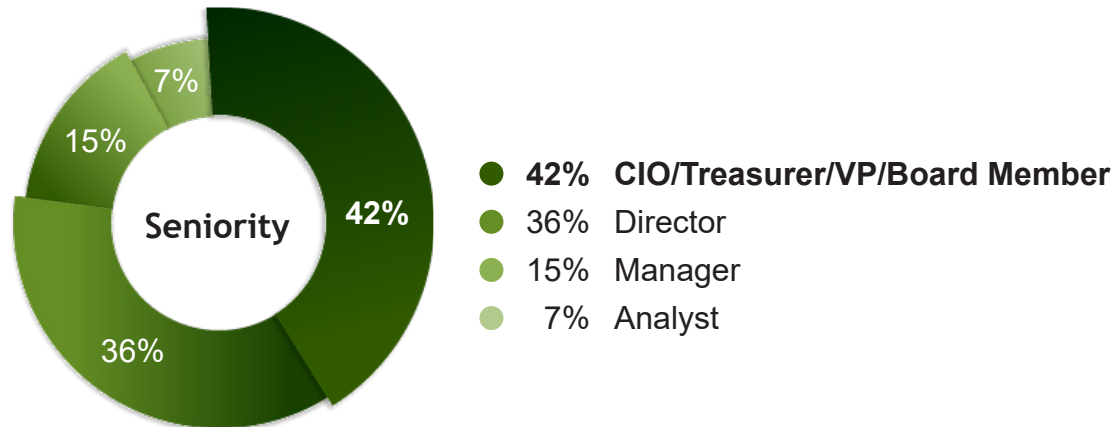


Meet thought leaders and visionaries



Network with industry stakeholders

Partner with Senior Investors with AUM Ranging from \$30M to \$5B





How We Deliver Attendees

- FENI secures **world-class speakers** and produces **leading-edge content** to attract new investors to the summit and encourage past delegates to return.
- Our results-driven delegate sales team is **dedicated to acquiring your top prospects**, target organizations and verticals.
- **Attendees are vetted** to prioritize seniority and relevance while capping sponsors to ensure the event remains unsaturated.
- Our institutional investor community is made up of **10,000+ members**, serving as one of the largest and most influential networks in Canada.
- Strategy Institute has established the reputation as a market leader with the **longest-running** institutional investment conference in Canada.
- Active in the institutional investor space **year-round**, we have our finger on the pulse of new trends and the sector's biggest players.
- We maximize engagement through a multichannel **targeted marketing campaign** to our institutional investor community, including social media, paid digital, thought leadership content, personalized emails, an event website and brochure.

Queen's
UNIVERSITY

Indigenous
Prosperity
Foundation

HAMILTON
Community
Foundation

THE MCCAIN
FOUNDATION

uOttawa

DIABETES
CANADA

La Fondation
McConnell

DALHOUSIE
UNIVERSITY

Toronto
Metropolitan
University

SHN

Ontario SPCA
and Humane Society

BMO
Foundation

ALBERTA
CANCER
FOUNDATION

University
of Manitoba

Windsor Essex
Community
Foundation

ATKINSON
For social and economic justice

McGill

LIDLAW
FOUNDATION

Rossy Foundation

METCALF
FOUNDATION

Azrieli
Foundation

THE WINNIPEG
FOUNDATION
For Good. Forever.

Concordia
UNIVERSITY

UNIVERSITÉ DE
SHERBROOKE

UVIC
UNIVERSITY OF VICTORIA

WWF

unicef
canada

DAVID SUZUKI
FOUNDATION
One nature.

CANADIAN WILDLIFE
FEDERATION

Canada
Canada

CALGARY
FOUNDATION
for community renewal

IVEY
foundation

THE TERRY FOX
FOUNDATION

Canadian
Cancer
Society

Scottish
Alzheimer
Society
CANADA

JEWISH
FOUNDATION
of GREATER TORONTO

THE UNITED CHURCH OF CANADA
FOUNDATION

ST. MICHAEL'S
HOSPITAL FOUNDATION

SickKids

UHN
Toronto General
Hospital
University Health
Network

BC
CANCER
FOUNDATION

Canada Council
for the Arts
Conseil des arts
du Canada

BANFF
FESTIVAL OF THE ARTS
CREATIVITY

R.O.M.
ROYAL ONTARIO
MUSEUM

peel
District
School Board

First Nations Child &
Family Caring Society

NATURE
CONSERVANCY
CANADA

MRC · CMRC

GEORGE
BROWN

SFU
SIMON FRASER
UNIVERSITY

Showcase Your Solutions Alongside Institutional Investment Leaders

Our FENI Summit attracts **40+ top industry speakers** at the forefront of their field.

Secure one of our sponsored speaking sessions and **establish your thought leadership** alongside senior investors.

Past Speakers



Jennifer Lee
Senior Economist &
Managing Director
BMO Capital Markets



Marc Gauthier
Corporate Treasurer &
Chief Investment Officer
Concordia University



Kevin Goldthorp
President & Chief
Development Officer
SickKids Foundation



Rashid Javed
Chief Operating Officer
Toronto Foundation



Angela Chapman
President &
Chief Executive Officer
**VGH & UBC Hospital
Foundation**



Sevaun Palvetzian
President &
Chief Executive Officer
UNICEF Canada



Dana Bezerra
President
The Heron Foundation



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



YOUR Sponsorship TAKEAWAY VALUE

1 Promote Your Thought Leadership

- Clients regard you as an **investment management leader** and a top asset manager.
- Stakeholders better understand the value and **credibility** of your brand and how to create a mutually beneficial partnership.
- Be known as the **go-to partner** for investment innovation with solutions for organizations that fit your ideal client profile.
- Market your on-demand speaking session and content to attract **new business**.

2 Generate High-Quality Institutional Investor Leads

- Identify **fresh prospects** from your target accounts.
- Meet face to face with **CIOs, Treasurers, VPs and Board Members** who are looking to leverage your expertise to meet their investment targets.
- Benefit from **increased audience engagement** with our gamification strategy and in-person engagement opportunities, including sponsored roundtables, workshops, breakfast briefings, VIP dinners, networking sessions and more.
- Utilize our **event app** to schedule in-person and virtual meetings with senior investors to convert prospects into clients.



YOUR Sponsorship TAKEAWAY VALUE

3 Elevate Your Brand Awareness & Trust

- Maximize **visibility** and **recognition** among a tailored audience made up of your target accounts.
- Leverage a co-marketing campaign with **100,000+ brand impressions**.
- Increase your **AUM**, achieving your growth objectives.
- Raise your **brand profile** to stand out against the competition.

4 Build Relationships & Brand Loyalty

- Meet **new clients** and deepen existing relationships.
- Enable your business development representatives to engage with investors **in person** and **virtually**.
- Form **advantageous partnerships** for ongoing AUM growth.
- Cultivate connections with your **target audience** using cutting-edge tools to matchmake and set up meetings onsite.

Your Sponsorship Packages

GOLD

- One of our most prestigious sponsorship opportunities with a **premium slot on the agenda** and **maximum exposure**.
- It features a **30-minute speaking session** as well as a fully branded exhibit booth.
- The package also includes:
 - » A comprehensive brand awareness and co-marketing campaign to 10,000+ institutional investment leaders
 - » Your logo on all event signage and collateral, including the event website, event app and marketing materials
 - » Access to the complete delegate and speaker list
 - » 3 all-access VIP passes for your team
 - » 10 additional complimentary passes to invite your clients and prospects



SILVER

- The silver package provides the perfect opportunity to **demonstrate your brand's expertise on key themes important to the community**.
- It includes a speaking or moderating spot on a **30-minute panel** as well as a fully branded exhibit booth.
- The package also includes:
 - » A comprehensive brand awareness and co-marketing campaign to 10,000+ institutional investment leaders
 - » Your logo on all event signage and collateral, including the event website, event app and marketing materials
 - » Access to the complete delegate and speaker list
 - » 3 all-access VIP passes for your team
 - » 10 additional complimentary passes to invite your clients and prospects

Your Sponsorship Packages



BRONZE

- Are your main sponsorship goals brand awareness and networking? The bronze package allows you to **demonstrate your expertise and network with prospects face to face.**
- You are provided with a **prime booth location** and access to all networking sessions onsite.
- The package also includes:
 - ▶▶ A fully customizable exhibit booth
 - ▶▶ A comprehensive brand awareness and co-marketing campaign to 10,000+ institutional investment leaders
 - ▶▶ Your logo on all event signage and collateral, including the event website, event app and marketing materials
 - ▶▶ Access to the complete delegate and speaker list
 - ▶▶ 2 all-access VIP passes for your team
 - ▶▶ 10 additional complimentary passes to invite your clients and prospects



NETWORKING

- As an entry-level sponsorship opportunity, **get a feel for the seniority and relevance of our institutional investor audience** with the chance to attend the event and leverage onsite branding.
- The package also includes:
 - ▶▶ 2 all-access VIP passes for your team
 - ▶▶ Your logo on all event signage and collateral, including the event website, event app and marketing materials as well as promotion through a co-marketing campaign



ADDITIONAL OPPORTUNITIES



TAILORED TO YOUR BUSINESS NEEDS

What better way to connect with potential prospects than through a host of engaging onsite activities or premier branding opportunities.



Roundtables



Conference Host



VIP Hosted Dinner



Lunch & Learn



Exclusive Evening Reception



Breakfast Briefing



Exclusive Lanyards



Wifi

Sponsorship Packages at a Glance

	GOLD	SILVER	BRONZE	NETWORKING
Thought Leadership	Premier 30-minute in-person speaking session	30-minute in-person panel discussion	×	×
Lead Generation	✓	✓	✓	✓
Brand Awareness	✓	✓	✓	✓
Exhibit Booth	✓	✓	✓	×
All-Access VIP Passes for Your Team	3 passes	3 passes	2 passes	2 passes
Complimentary Passes for Your Guests	10 passes	10 passes	10 passes	×

SPONSOR TESTIMONIALS

The FENI event was a perfect opportunity to connect with a range of allocators from an underrepresented group in the investment community ... We had a lot of meaningful discussions, which provide opportunities for continued outreach and partnership.



Overall, it was a great experience! The FENI Summit gathers innovative, like-minded people — it was valuable for us to engage attendees in conversations about using their investments for good.



An excellent opportunity to learn more about the Canadian not-for-profit sector... The in-person networking, speaking opportunity and exhibit booth interaction all provided great value.



We were able to meet potential leads. This is a great networking event to meet endowments and foundations that are looking for investment opportunities.



Second year attending this event. Both years I was able to meet new people and generate leads. We plan to sponsor the 2027 FENI Summit!



Interesting sessions and a great chance to showcase our work and products to foundations and endowments. 9/10 for the quality of the event attendance and event app.



I just wanted to thank you for being fantastic hosts of the conference ... You folks made our participation seamless.



Great experience! Small venue allowed for high interaction ... In-person networking was very helpful ... Superb communication with the SI team, it was our first time participating and they made it very easy to fit in.



It was a great opportunity to meet industry leaders!





Partner with an Industry Leader!

For over 30 years, Strategy Institute has facilitated long-term partnerships between institutional investors and asset managers.

- **25+ years** building relationships and credibility within the institutional investor space
- **Content leader:** Senior producers immersed in the fields they research in order to curate innovative industry content
- **Customer Success** program that provides white glove service to ensure you get the most value out of your sponsorship experience

Secure Your Spot Now

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We have a limited number of speaking opportunities and they sell out quickly!
Connect with our community of senior investors looking for new asset classes and managers.



Book a call to learn how this opportunity can help you generate new leads and increase your pipeline!

Chee Vang

Sponsorship Manager

Call: 1-866-298-9343 x 214

chee@strategyinstitute.com