

Foundation, Endowment & Not For Profit Investment Summit

Post Event Report

February 24-25
Hyatt Regency Toronto



Brought to you by:



The Foundation & Endowment Investment (FENI) Summit is where Finance, Investment, and Philanthropy Leaders Shaped the Future of Mission-Aligned Investing.

Foundation, Endowment & Not for Profit Investment Summit 2026 brought together Canada's most forward-thinking foundation, endowment, university, and not-for-profit leaders to redefine how mission and capital work together — and win.

Two days. The conversations that mattered most:

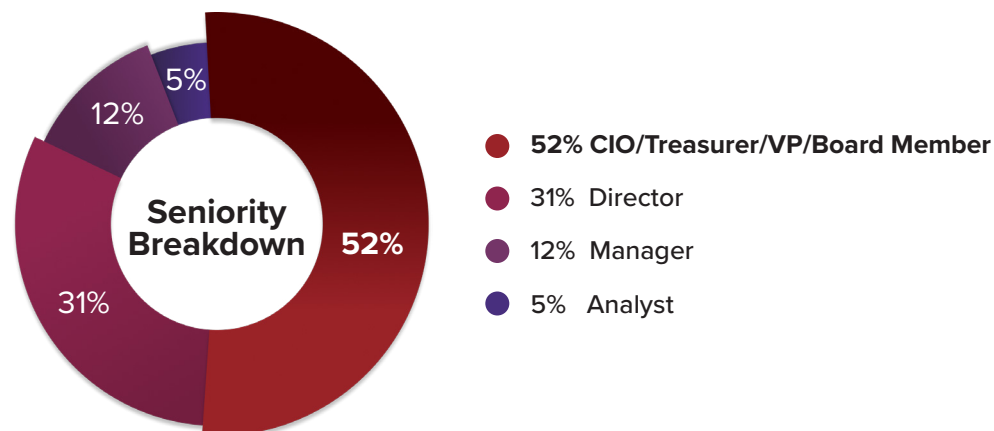
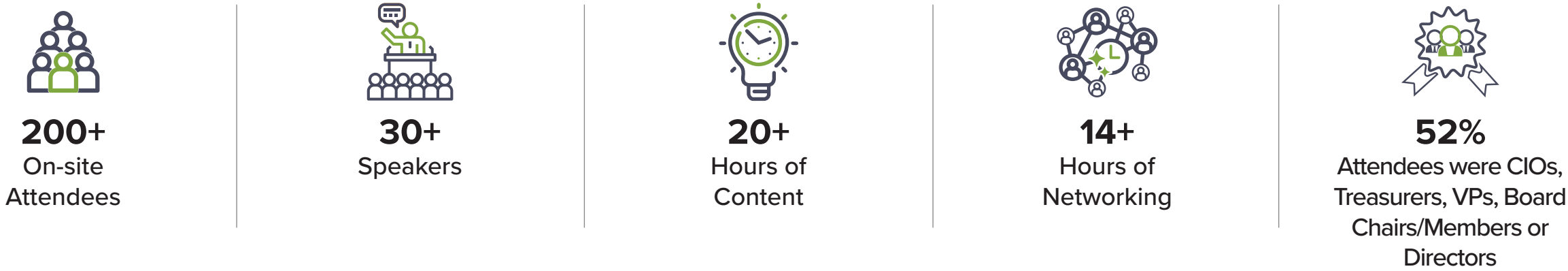
- Mission-aligned and impact investing without sacrificing returns
- Portfolio resilience in volatile, geopolitically fragmented markets
- ESG, governance, and fiduciary duty as investment cornerstones
- Reconciliation and community capital driving change from within

80%
of attendees were
CIOs, Treasurers,
VPs, Board
Chairs/Members or
Directors

Where leaders stopped talking about mission-aligned investing — and started winning with it.



Foundation, Endowment, & Not for Profit Investment in Numbers



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

“Terrific and impactful event, on time and professionally run from start to finish. High-quality sessions that were genuinely relevant to our work, and refreshing to see a conference that isn’t ‘pay to play,’ where sponsors aren’t the only ones getting the stage.”



“Very interesting and informative sessions, and the roundtable discussions were especially dynamic. Standouts included Evolving Investment Practices for Hospital Foundations, the Disbursement Quota Deep Dive, and Maximizing Mission and Mobilizing Capital for Change, which brought everything together really well.”



“Amazing, relevant presentations and the speakers were experienced with genuinely great insights. I enjoyed every session, especially the coverage of responsible investing, alternatives, and impact investing.”



“Great speakers and topics, and a schedule that made room for real networking. The streaming option was a nice touch too. Sessions on mission-related investing for mid to small endowments were especially valuable, and the location was excellent.”



“Very satisfied with the event overall, and the registration and platform experience was easy to use with helpful pop-ups along the way. Jennifer Lee’s session on investment portfolio and policy statements was a highlight, right in line with what we’re working through as a board.”



“Completely satisfied, and as my first time at the conference, I came away with a real spectrum of useful information. The session on emotional intelligence stood out in particular.”



Discover, Network, Transform



Discover

Hear from the leaders redefining institutional investing across foundations, endowments, and not-for-profits. Real strategies on mission-aligned investing, ESG integration, and alternative allocation — built for where the sector is headed..

Network

Connect with senior finance and investment leaders from foundations, endowments, universities, and not-for-profits across Canada. Keynotes, roundtables, speed networking, and evening receptions — built for relationships beyond the conference.

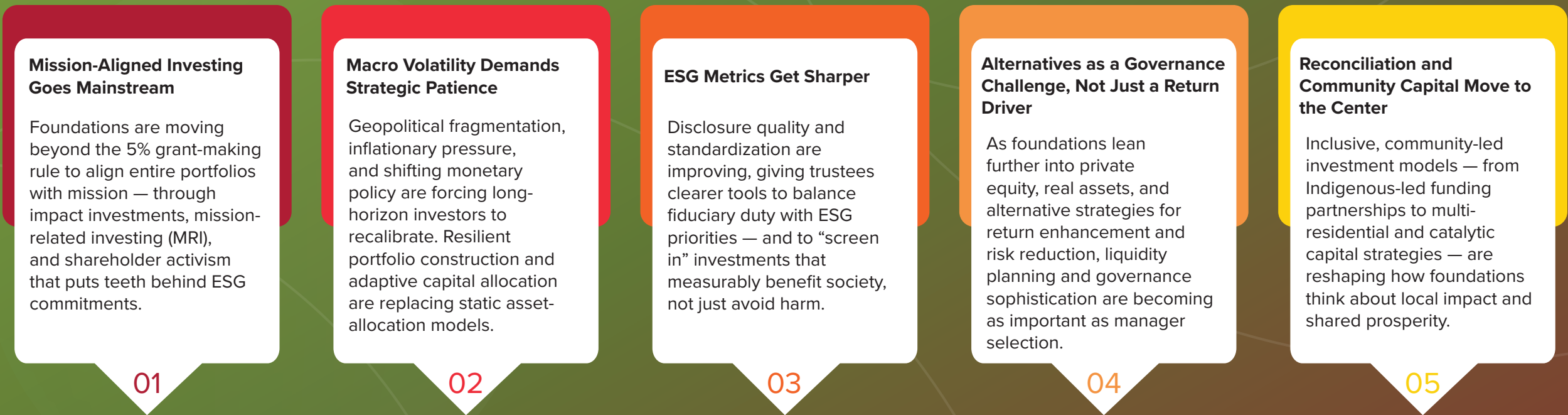
Transform

Learn from the innovators redefining mission-aligned investing. From ESG and impact investing to OCIO strategy and alternatives — walk away with frameworks that move the needle on governance and long-term impact..

2026 Themes: Advancing Mission-Aligned Investment Strategy Through Purpose, Resilience & Governance

The summit made one thing clear: for foundations and endowments, mission and financial performance aren't a trade-off — they're engineered together. Leaders left with real frameworks to strengthen governance, manage volatility, and deepen impact.

5 Big Trends from FENI 2026:



VIEW OUR FENI CONTENT HUB →

Our Speakers

[VIEW AGENDA →](#)



Marc Gauthier

Treasurer, Chief Investment Officer
Concordia University



Arijit Banik

Treasurer
York University



Vani Visva

VP, Finance & Operations
Scarborough Health Network Foundation



Anna Zsambobki

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 McDonald

CEO, President
Imagine Canada



Lorraine Ballaine

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



Christy Holtby

VP, Philanthropy
Alberta Cancer Foundation

Our Speakers

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Emily Yano
Director, Finance
Alberta Cancer Foundation



Wayne Miranda
Director, Social Finance & Impact Investing
Definity Foundation



Alana Stott
CEO
Blue Rose Foundation



Subash Biswal
Chief Financial and Business Officer
Indigenous Works



Yulena Wan
Chief Operating / Financial Officer
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



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

Our Speakers

[VIEW AGENDA →](#)



Koudjo Oni

Director of Revenue
Cancer Research Society



Jennifer Lee

Senior Economist and
Managing Director Economics
BMO Capital Markets



Michel Brutti

Founder & CEO / Board Member &
President, Investment Committee
Clear Skies Investment Management



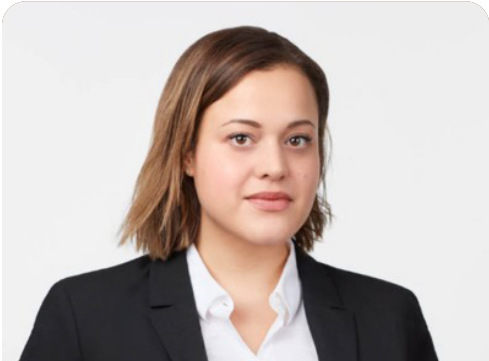
Michael Beaupré

Managing Director, Client
Relationships
IMC



Andrew Sweeney

Managing Director, Institutional
Portfolio Manager
PH&N Institutional



Caroline Grandoit

Senior Managing Director and
Lead Portfolio Manager
Fiera Capital



Sarah Aves

Head of Institutional Clients,
Canada
Fiera Capital



Kim Desmarais

Senior Advisor, Responsible
Investment Products Strategy
**Desjardins Global Asset
Management**



Robert Wilson

Head of Innovation and
Portfolio Strategies
PICTON Investments



Chris Barber

Deputy Co-CIO of OCIO
Solutions
RockCreek

Our Speakers

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Peter Muldowney

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



Stephanie Tsui

Chief Sustainability Officer, Portfolio Manager, Partner
Genus Capital Management



Alexandra Katz

Managing Partner, Head of Institutional Sales
Hazelview Investments



Colleen Krempulec

Managing Partner, Head of Sustainability and Brand
Hazelview Investments



Jessica Barford

Associate, Institutional & Consultant Relations
Hazelview Investments



Christine Cappabianca

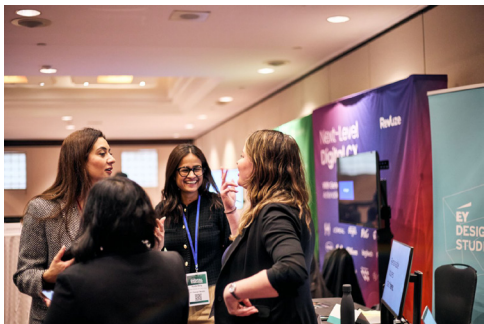
Portfolio Manager
Impax Asset Management



Alex Letko

Regional Manager, Central Canada, Portfolio Manager
Letko Brosseau & Associates

Activations and Experiences to Inspire and Energize Page



Speed Networking

High-energy, timed introductions built for quick connections — trade ideas and contacts with institutional investment leaders from across the foundation, endowment, and not-for-profit sector in just minutes.



Roundtables

Focused, peer-group discussions split by AUM tier (under \$5M, \$5M–\$100M, \$100M+) — tackle the due diligence, governance, and resource challenges specific to organizations your size.



Networking Breakfast & Lunch

Relaxed breakfast and lunch gatherings both days — an easy way to start meaningful conversations with fellow institutional investment leaders before and between sessions.



Exhibitor Lounge

Meet one-on-one with leading solution providers, explore the latest institutional investment strategies and tools, and enter to win prizes at sponsor booths throughout the day.



Evening Reception

Unwind with cocktails and conversation after Day 1 — scan your badge at exhibitor booths for a chance to win prizes, and set the stage for new connections heading into Day 2.

2026 Attending Organizations: Advancing Mission-Aligned Investment Strategy

FENI 2026 united senior leaders from across foundations, endowments, and not-for-profit organizations for two days of real, actionable conversation — from mission-related investing and ESG integration to portfolio resilience and the balance between fiduciary duty and long-term impact.

Some of the incredible organizations who joined us:

- | | | |
|---|--|---|
| ☒ Alana Stott | ☒ Canada Post Corporation | ☒ Christian School Foundation (Canada) Inc. |
| ☒ Alberta Cancer Foundation | ☒ Canadian Cancer Society | ☒ Christian Stewardship Services |
| ☒ Anglican Church of Canada | ☒ Canadian Coalition for Green Health Care | ☒ Circle Community Land Trust |
| ☒ Atlantic Baptist Foundation | ☒ Canadian Council for Indigenous Business | ☒ Community Foundation of Greater |
| ☒ Banff Canmore Community Foundation | ☒ Canadian Hero Fund | ☒ Peterborough |
| ☒ Baycrest | ☒ Canadian Medical Association | ☒ Community Foundations of Canada (CFC) |
| ☒ BenefAction Foundation | ☒ Cancer Research Society | ☒ Compassion Canada |
| ☒ Bill Solomon | ☒ Canuck Place Children’s Hospice | ☒ Concordia University |
| ☒ Bloorview Research Institute at Holland | ☒ Carea Community Health Centre | ☒ Cross Border Ventures |
| ☒ Bloorview | ☒ Catherine Donnelly Foundation | ☒ Dartmouth General Hospital Foundation |
| ☒ Brain Canada | ☒ CCM Canada | ☒ Definity Foundation |
| ☒ Brockville & District Hospital Foundation | ☒ Centennial College | ☒ Destination Canada |
| ☒ CAMH | ☒ Children’s Aid Foundation Of Canada | ☒ Dickhout Family Foundation |

- ✓ East 97
- ✓ Empower Simcoe
- ✓ ErinoakKids Centre for Treatment and Development
- ✓ F.K. Morrow Foundation
- ✓ Federation of Canadian Municipalities
- ✓ Fondation Michaëlle Jean Foundation
- ✓ Fondation Yvan Morin
- ✓ Fonds Fiducie de Chantier de l'économie sociale
- ✓ Food Banks Canada | Banques alimentaires Canada
- ✓ Gakino'amaage: Teach For Canada
- ✓ Girl Guides of Canada
- ✓ Grand River Hospital
- ✓ Greater Montreal Climate Fund
- ✓ Hamilton Health Sciences
- ✓ Harbourfront Centre
- ✓ Indigenous Institutes Consortium
- ✓ Indigenous Prosperity Foundation
- ✓ Indigenous Works

- ✓ Indus Community Services
- ✓ Inspirit Foundation
- ✓ Irpp
- ✓ Ivey Research – Ivey Business School at Western University
- ✓ Jane Goodall Institute of Canada
- ✓ Jewish Foundation of Greater Toronto
- ✓ Jim Pattison Children's Hospital Foundation
- ✓ Kenjgewin Teg
- ✓ Kensington Market Community Land Trust
- ✓ Kids Help Phone
- ✓ Lakeridge Health Foundation
- ✓ Law Foundation of Ontario
- ✓ Le Fonds de finance sociale CAP Finance
- ✓ Lutheran Foundation Canada
- ✓ Lyle S. Hallman Foundation
- ✓ MakeWay
- ✓ MAZON Canada
- ✓ McMaster University Department of Medicine
- ✓ Métis Nation of Ontario
- ✓ Mississaugas of the Credit First Nation

- ✓ Nature Conservancy of Canada
- ✓ Oakville Community Foundation
- ✓ Ontario Heritage Trust
- ✓ Ontario Sustainable Energy Association
- ✓ Ontario Trillium Foundation
- ✓ Oshki-Pimache-O-Win Education & Training Institute
- ✓ Ottawa Climate Action Fund
- ✓ Ottawa Community Foundation
- ✓ Ottawa Community Land Trust
- ✓ PaulBarberFoundation
- ✓ Peel Children's Aid Society (Peel CAS)
- ✓ Praxis Spinal Cord Institute
- ✓ Presbyterian Church In Canada
- ✓ Princess Margaret Cancer Centre
- ✓ Prospera International Network of Women's Fund
- ✓ Rancho San Antonio
- ✓ Reception House Waterloo Region
- ✓ Reconciliation Canada
- ✓ Region of Peel

- ✓ Robert Kerr Foundation
- ✓ Ronald S. Roadburg Foundation
- ✓ Royal Ontario Museum
- ✓ Royal Roads University Student Association
- ✓ Safehaven
- ✓ Scarborough Health Network
- ✓ SE Health
- ✓ SE Impact Ventures
- ✓ Second Harvest
- ✓ Services and Housing In the Province
- ✓ Social Venture Connexion (SVX)
- ✓ Sonor Foundation
- ✓ Southlake Health
- ✓ Spire Philanthropy
- ✓ St. Michael's College School
- ✓ St. Michael's Hospital
- ✓ St. Paul's Bloor Street
- ✓ Sunnybrook
- ✓ TELUS Friendly Future Foundation
- ✓ The Atmospheric Fund
- ✓ The Brenda Strafford Foundation

- ✓ The Canadian Office
- ✓ The Counselling Foundation of Canada
- ✓ The County Foundation
- ✓ The Equality Fund
- ✓ The Free Methodist Church in Canada
- ✓ The Hamilton Community Foundation
- ✓ (Education)
- ✓ The Kidney Foundation of Canada
- ✓ The National Ballet of Canada
- ✓ The University of Winnipeg Foundation
- ✓ Thompson Towers
- ✓ Toronto Foundation
- ✓ Toronto Foundation For Student Success
- ✓ Toronto United Church Council
- ✓ Tree of Life Foundation
- ✓ Tree of Life Funding
- ✓ United Church of Canada
- ✓ University of Ottawa Heart Institute
- ✓ University Hospital Foundation
- ✓ University Hospitals Kingston Foundation
- ✓ University of Toronto

- ✓ University of Waterloo
- ✓ VGH & UBC Hospital Foundation
- ✓ Victorian Order of Nurses for Canada
- ✓ W.C. Kitchen Family Foundation
- ✓ Waterloo Regional Health Network (WRHN)
- ✓ Waubetek
- ✓ Waypoint Centre for Mental Health Care
- ✓ Western University
- ✓ Windmill Developments
- ✓ Winnipeg Foundation
- ✓ Winspear Centre Edmonton Symphony
- ✓ Orchestra
- ✓ Women's College Hospital Foundation
- ✓ World Renew
- ✓ Wycliffe College
- ✓ Yellow Brick House
- ✓ York University
- ✓ YWCA Hamilton

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.



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.

SPRING 2027 PRE-SALE EXPIRES ON SEPTEMBER 30, 2026	\$995
REGULAR TICKET	\$1,595

REGISTER NOW →

REGISTER FOR DELEGATE PASS

Contact:
Anthony Arqueza
Delegate Registration Manager
Email: Anthony.Arqueza@strategyinstitute.com

GROUP RATES

Enhance your team collaboration, ROI, and industry presence with our existing group discounts for groups of 3+.

Speak with **Anthony** about our best rates.
Email: Anthony.Arqueza@strategyinstitute.com

25th Annual

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

MARCH 10-11, 2027 | TORONTO, ON