

25th Annual

# Foundation, Endowment & Not For Profit Investment

March 10 & 11, 2027 Summit

TORONTO, ON

**FUTURE-PROOFING  
FOUNDATIONS:**  
WHERE CAPITAL  
MEETS PURPOSE

Day 01

Tuesday, March 10, 2027

|          |                                                                                   |         |                                                                                     |
|----------|-----------------------------------------------------------------------------------|---------|-------------------------------------------------------------------------------------|
| 7:30 AM  | Registration & Networking Breakfast: Build Your Investment Community              | 1:40 PM | Tracks: Rethinking Portfolio Construction / In-House vs. OCIO vs. Consultant        |
| 8:30 AM  | Opening Remarks From the Chairperson: Set Up Two Days of Insight                  | 2:10 PM | Tracks: Keeping Mission at the Center / The RFP Process for Charities               |
| 8:40 AM  | Spotlight Session: Navigating Tariffs & Geopolitical Trade Tensions               | 2:40 PM | Tracks: Climate & Mission Alignment in Manager Selection / Outcomes-Based Financing |
| 9:10 AM  | Opening Keynote: Canada, the US & the World                                       | 3:10 PM | Networking Break & Exhibitor Lounge: Consult Industry Experts                       |
| 9:40 AM  | Speed Networking: Make Meaningful Connections                                     | 3:40 PM | Industry Expert: What Can Foundations Learn From Investors Abroad?                  |
| 10:10 AM | Industry Expert: Risk Appetite & Investment Policy for the Boardroom              | 4:10 PM | Panel Discussion: Chase the Dollar or Chase the Impact?                             |
| 10:40 AM | Case Study: A Regulatory Challenge Becomes a Platform for Impact                  | 4:40 PM | Closing Keynote: What the Great Wealth Transfer Means for Foundation Strategy       |
| 11:10 AM | Exhibitor Booth: Visit Booths & Source Expertise                                  | 5:10 PM | Closing Comments From the Host                                                      |
| 11:40 AM | Tracks: Private Markets & Alternatives / Building Your First Investment Committee | 5:15 PM | Evening Reception: Conversation, Music & Networking                                 |
| 12:10 PM | Tracks: The Liquidity Challenge / The Investment Policy Playbook                  | 6:15 PM | Conference Adjourns to Day 2                                                        |
| 12:40 PM | Networking Lunch: Delve Into Industry Conversations                               |         |                                                                                     |

Day 02

Wednesday, March 11, 2027

|          |                                                                          |
|----------|--------------------------------------------------------------------------|
| 7:30 AM  | Networking Breakfast & Exhibitor Lounge: Fuel Up Before Day Two          |
| 8:30 AM  | Opening Remarks From the Chair                                           |
| 8:40 AM  | Spotlight Panel: What Changes, What Doesn't & What You Need to Know      |
| 9:10 AM  | Keynote Session: Modern Slavery, Supply Chains & the Investor Blind Spot |
| 9:40 AM  | Industry Expert: From ChatGPT to Copilot, What's Actually Useful?        |
| 10:10 AM | Exhibition Lounge & Networking: Connect Between Sessions                 |
| 10:40 AM | Case Study: The Rise of Place-Based Investing                            |
| 11:10 AM | Industry Expert: What Actually Reduces Risk in Today's Market            |
| 11:40 PM | Roundtables by AUM: Peer Conversations That Fit Your Scale               |

|          |                                                                        |
|----------|------------------------------------------------------------------------|
| 12:30 PM | Networking Lunch & Exhibitor Lounge: Delve Into Industry Conversations |
| 1:30 PM  | Panel Discussion: How to Know Your Investments Are Making a Difference |
| 2:00 PM  | Industry Expert: A Roadmap to Automation & Managing the Risks          |
| 2:30 PM  | Case Study: Nature, Biodiversity & the Investment Portfolio            |
| 3:00 PM  | Networking Break & Exhibitor Lounge: Consult Industry Experts          |
| 3:30 PM  | Fireside Chat: Following Your Capital Past the Point of Allocation     |
| 4:00 PM  | Closing Keynote: Capital, Technology, Governance & Impact              |
| 4:30 PM  | Closing Comments From the Host                                         |
| 4:35 PM  | Conference Adjourns to 2028                                            |

# Trusted by Leading Companies Specializing in institutional investors, investment committees, foundations, endowments, charities, and not-for-profit organizations

Don't just take our word for it! Here's what past delegates say about the takeaways, connections, and ROI.

"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."



"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."



"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."



"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."



"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."



"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."



# Who Attends?



# 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 community of foundation, endowment, and non-profit investment 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.

|                                                              |                |
|--------------------------------------------------------------|----------------|
| <b>SPRING 2027 PRE-SALE</b><br>EXPIRES ON SEPTEMBER 30, 2026 | <b>\$995</b>   |
| <b>GROUP OF 3</b>                                            | <b>\$2,500</b> |

**REGISTER NOW** →

**REGISTER FOR DELEGATE PASS**  
**Contact:**  
**Anthony Arqueza**  
Delegate Registration Manager  
Email: [Anthony.Arqueza@strategyinstitute.com](mailto: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](mailto:Anthony.Arqueza@strategyinstitute.com)

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Summit**

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