

23rd Annual

Foundation, Endowment & Not For Profit Investment Summit



SPONSORSHIP LEAD GENERATION GUIDE

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

MARCH 5-6, 2025



Build Valuable Relationships and Increase Your Assets Under Management

- The **23rd 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 **\$50M** to **\$10B**



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



94% of attendees are from foundations, endowments, non-profits and 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

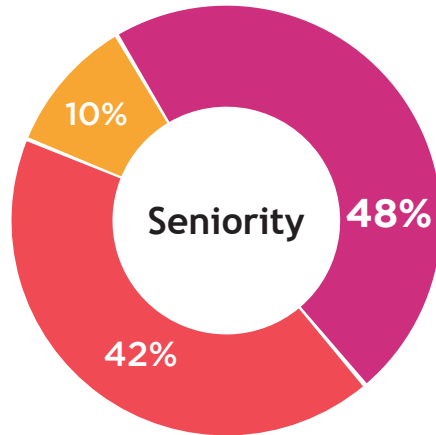


Meet thought leaders and visionaries

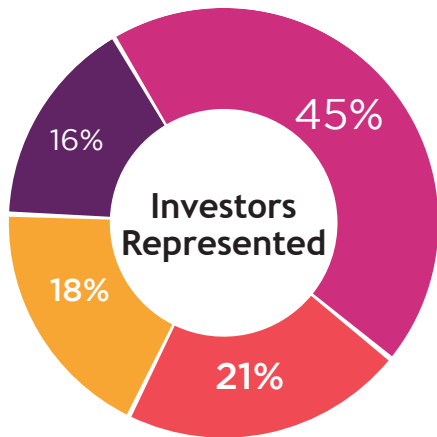


Network with industry stakeholders

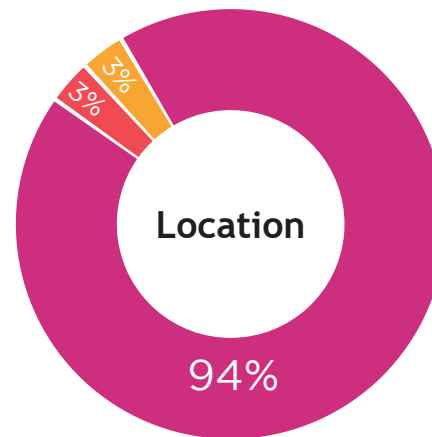
Partner with Senior Investors with AUM Ranging from \$50M to \$10B



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



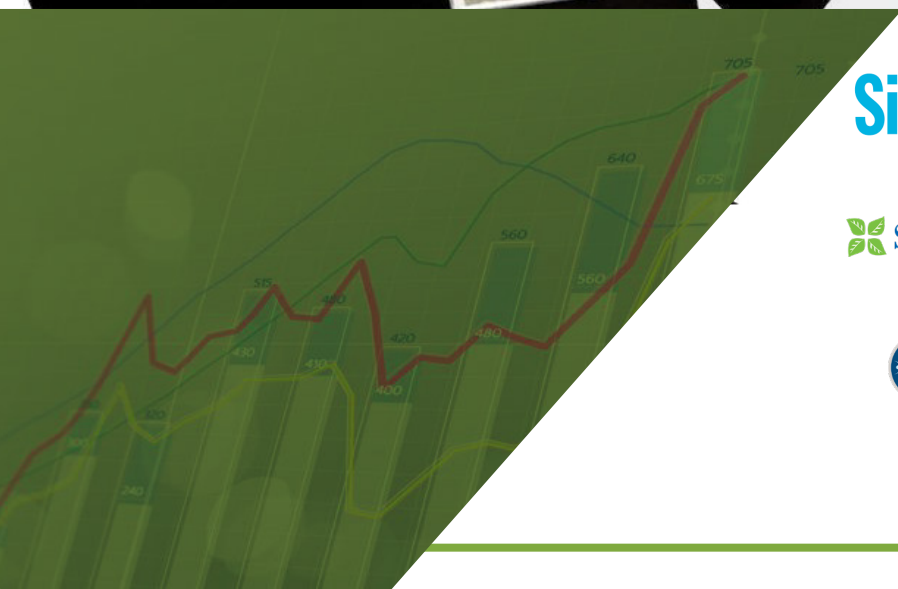
- 45% Foundations
- 21% Endowments
- 18% Charities
- 16% Non-Profits



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

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 **5,000+ 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.



SickKids®



Toronto Metropolitan University

Sunnybrook



The London Community Foundation



UHN FOUNDATION | Toronto General Toronto Western Toronto Rehab Michener Institute



JDRF IMPROVING LIVES. CURING TYPE 1 DIABETES.

camh Centre for Addiction and Mental Health



SPONSORSHIP
LEAD GENERATION
GUIDE

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



Arijit Banik
Treasurer
York University



Tammy Moore
Chief Executive Officer
ALS Society of Canada



Vani Visva
SVP, Finance & Operations
VGH & UBC
Hospital Foundation



Dana Bezerra
President
The Heron Foundation



Jessica Diniz
President & Chief Executive Officer
Juvenile Diabetes
Research Foundation



Kevin Goldthorp
President & Chief Development Officer
SickKids Foundation



Jeffry Haber
Senior Director, Finance
The Commonwealth Fund



Sarah Charters
President
United Church of
Canada Foundation



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 5,000+ institutional investment leaders
 - ▶▶ Your logo on all event signage and collateral, including the event brochure, 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 5,000+ institutional investment leaders
 - ▶▶ Your logo on all event signage and collateral, including the event brochure, 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 5,000+ institutional investment leaders
 - ▶▶ Your logo on all event signage and collateral, including the event brochure, 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

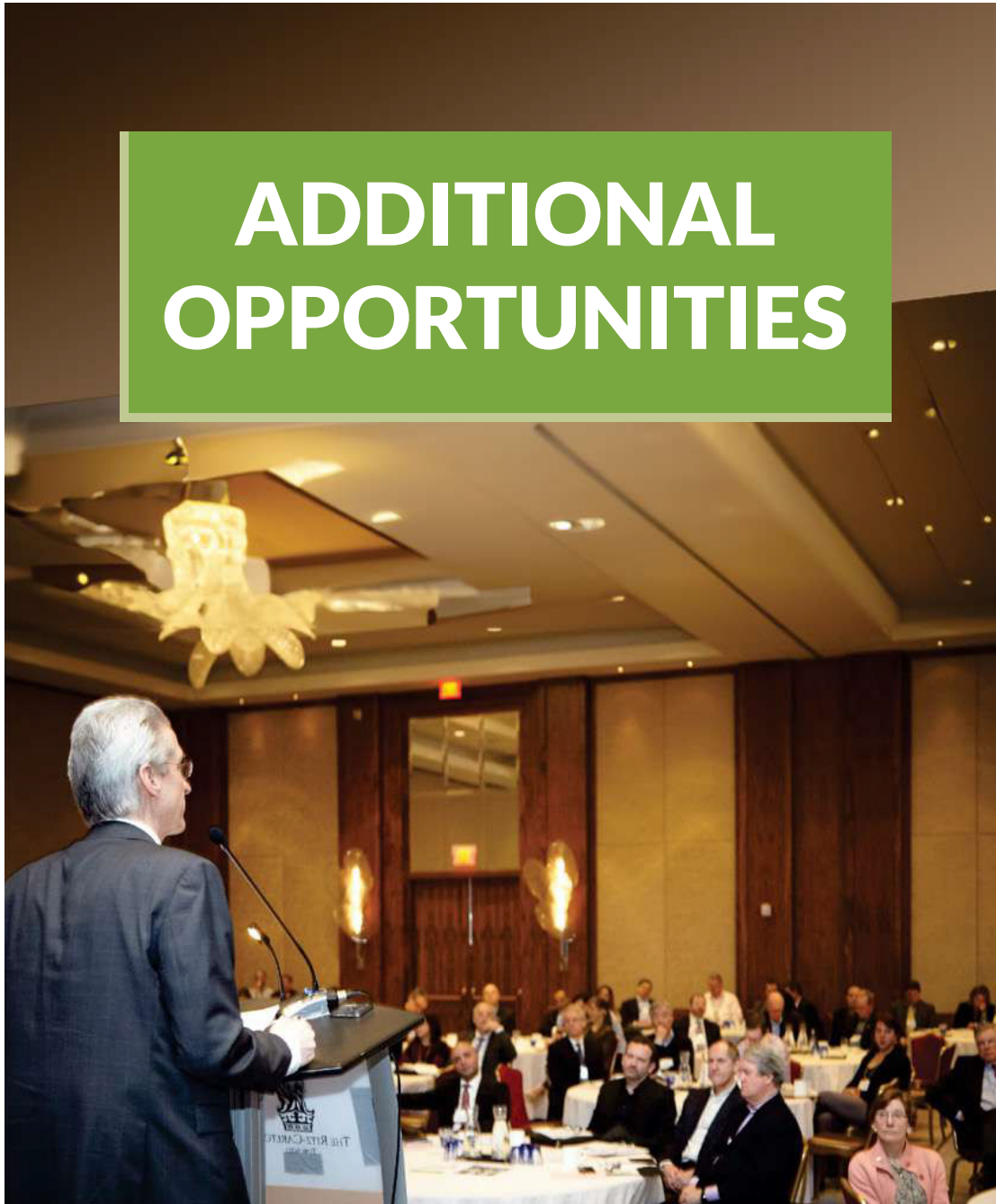


NETWORKING

- 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 brochure, 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

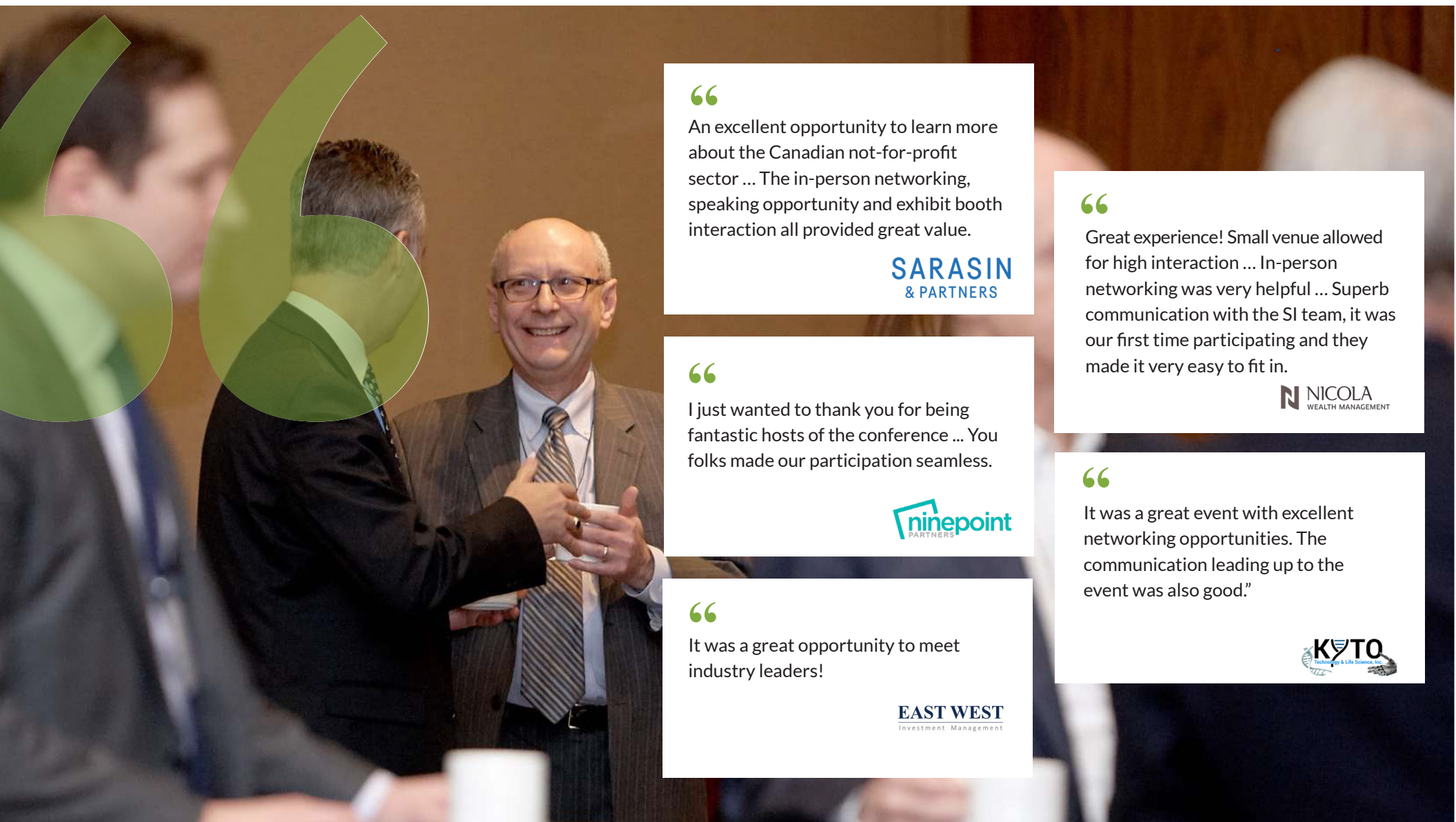


Wifi

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



“

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.

SARASIN
& PARTNERS

“

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

ninepoint
PARTNERS

“

It was a great opportunity to meet industry leaders!

EAST WEST
Investment Management

“

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.

NICOLA
WEALTH MANAGEMENT

“

It was a great event with excellent networking opportunities. The communication leading up to the event was also good.”

KYTO
Technology & Life Science, Inc.



Partner with an Industry Leader!

For over 25 years, Strategy Institute has facilitated long-term partnerships between institutional investors and asset managers.

- **23+ 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

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chee@strategyinstitute.com