

23rd Annual

Foundation, Endowment & Not For Profit Investment Summit

March 5 & 6, 2025

Hyatt Regency, Toronto, Ontario.

**A prestigious
gathering of senior
foundations,
endowment, and
key investment
decision-makers**

Welcome to a New Era of
Institutional Investing



**REGISTER
NOW**



WELCOME TO THE FUTURE OF INVESTMENT INNOVATION

Welcome to the Foundation & Endowment Investment Summit 2025, where Canada's leading institutional investors converge to navigate a complex financial landscape.

As foundations and endowments face unprecedented challenges—from market volatility to evolving ESG priorities—this summit brings together visionary leaders to explore innovative strategies for both financial returns and social impact.

Join us in Toronto this March for two days of intensive learning, strategic insights, and meaningful connections with peers who are shaping the future of institutional investing.

www.foundationendowmentsummit.com



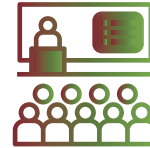
Get Ready to Innovate & Implement

GET READY TO DISCOVER AND NETWORK WITH FINANCIAL SERVICES LEADERS!



Compelling Keynote Sessions

- **Global Market Outlook:** Navigate volatility and spot emerging trends for increased returns
- **Polycrisis World:** Transform local actions into global impact
- **ESG Integration:** Balance mission-related investments with financial performance



Asset Allocation Roundtables

- Fixed Income Strategies
- Alternative Investments
- Private Equity Opportunities
- Real Estate & Infrastructure
- ESG & Impact Investing



Executive Insights

- **UNICEF Canada - Purpose-Driven Impact:** Shaping future investment strategies
- **WWF-Canada - Value Beyond Profit:** Seizing opportunities in impact investing
- **VGH & UBC Foundation - Governance Excellence:** Building robust investment frameworks



Networking Opportunities

- **Speed Networking Sessions:** Connect with industry peers
- **Evening Reception:** Build relationships over cocktails and conversation
- **Exhibitor Lounge:** Engage with leading investment solution providers
- **Networking Breakfasts:** Start your day with meaningful discussions



Strategic Deep Dives

- **Portfolio Management:** Balance long-term vision with short-term funding demands
- **OCIO Partnerships:** Master outsourced CIO relationships for optimal results
- **CRA Compliance:** Navigate new regulatory changes and maximize donation potential

Secure Your Place at Canada's Premier Foundation & Endowment Investment



SPEAKER LINE-UP

Handpicked for you

... AND MANY MORE!



ARIJIT BANIK
Treasurer
York University



SEVAUN PALVETZIAN
CEO
UNICEF Canada



ANGELA CHAPMAN
CEO
VGH & UBC Foundation



MEGAN LESLIE
CEO, President
WWF-Canada



DIONNE BROADUS
National VP, Philanthropy & Impact Investing
American Heart Association



IDALIN MCKENZIE
VP, Finance and Asset Management
YWCA Hamilton



DONNA ZIEGLER
Executive Director
South Saskatchewan Community Foundation



JAMISON STEEVE
CEO
Metcalf Foundation



SAMEER CHETTRY
Director, Finance & Operations
Saskatoon Community Foundation



AKASH RATTAN
Audit and Finance Committee
Surrey Hospitals Foundation,
BC College of Pharmacists



JEFFRY HABER
Sr. Director, Finance
Commonwealth Fund



SARAH CHARTERS
CEO
United Church of Canada



MICHAEL (ROBERT) ANHORN
CEO
Canadian Mental Health Association (CMHA) Toronto



JUDY ZHU
Executive Director
Royal Columbian Hospital Foundation



ANDY SULLIVAN
VP, Asset Management
YWCA of Southwestern Ontario





Who attends?



“

“Great event gave me lots to think about beyond just on investment strategies”

United Church of Canada Foundation



“

“Excellent. I’ll definitely participate in future conferences.”

Louis Brier Jewish Aged Foundation



“

“Great series of speakers that addressed a variety of good topics.”

University Hospital Foundation (Edmonton)



“

“Good speakers, well organized, well presented.”

McConnell Foundation



“

“Conference is a crucial ‘must attend event’ for all who wish to stay at the forefront of innovation and information to best benefit their foundations.”

Central Okanagan Foundation



“

“Overall, an excellent conference.”

Foundation of Kingston and Area



AGENDA - DAY 1

Wednesday, March 5, 2025

7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **investing 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 KEYNOTE: A GLOBAL MARKET OUTLOOK FOR INSTITUTIONAL INVESTORS

How to Spot Trends and Increase Returns

The markets have been volatile in the last few years and there are a lot of questions about inflation, and a potential recession. More significantly, it is important to know how to forecast these factors, so you can bolster your investing success over the coming year. Take back to your office strategies to:

- Understand the impact of geopolitical events and how to adapt, so you can continue to make reliable returns.
- Explore macroeconomic indicators, geopolitical developments, and sector-specific trends.
- Address the looming potential recession and inflationary pressures: the peaks and troughs ahead

Optimize your ability to spot macroeconomic trends, so you can increase returns.

Arijit Banik, Treasurer, **York University**

[Invited] Eric Lascelles, Managing Director & Chief Economist, **RBC**

9:30 AM SPOTLIGHT: GLOBAL SHIFTS IN A NEW, POLYCRISIS WORLD

Harnessing the Power of Purpose to Shape the Future

In today's rapidly changing landscape—marked by geopolitical shifts, climate change, evolving migration patterns, and the transformative potential of AI—there are unparalleled opportunities for impactful action. This session will empower you to:

- Leverage Purpose for Impact: Discover how foundations, endowments, and NGOs can play a pivotal role in creating positive change and shaping a better future.
- Unpack the Risks, Rewards and Impact Return of Global Action: Maximize effective alignment of your mission within an ever-changing global context.
- Transform Local Actions into Global Impact: Understand how Canadian based drive significant global outcomes, amplifying your organization's reach and influence.

Drive meaningful change in this complex world and create a lasting legacy through purpose-driven action.

Sevaun Palvetzian, CEO, **UNICEF Canada**

10:00 AM INDUSTRY EXPERT: SCHRODERS

10:30 AM MORNING COFFE BREAK

10:45 AM INDUSTRY EXPERT: AVIVA INVESTORS

11:15 AM C-SUITE EXCLUSIVE: BUILD A ROBUST TEAM, MANAGEMENT AND GOVERNANCE STRUCTURE

Enabling Growth, Improvement and Strengthening of a Foundation's Funds, Impact and Endowment Portfolio

Leave a trail of growth, improvement and strength in your wake by transforming your organization's assets. Master success factors to:

- Working in harmony with the Chair and Board to achieve long term objectives
- Achieving impact and collaborative philanthropy
- Utilizing the expertise of external investment managers to maintain purchasing power of your Foundation's main endowment

Work in collaboration with your team and increase assets of your foundation

Michael (Robert) Anhorn, CEO, **Canadian Mental Health Association (CMHA) Toronto**

Jamison Steeve, CEO, **Metcalf Foundation**

11:45 AM SPEED NETWORKING AND EXHIBITOR LOUNGE! MAKE MEANINGFUL CONNECTIONS

Grow your network by meeting like-minded individuals to share your latest ideas and projects. In this session, you will:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a **fun, natural setting**.
- Join a community of digital marketing experts and **gain invaluable support**.
- 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.

12:15 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 will last beyond the conference.
- Enjoy great food and service while engaging with your **investing colleagues**.

1:15 PM INDUSTRY EXPERT: TAPESTRY

TRACK 1: LARGE FOUNDATION, ENDOWMENT & NOT-FOR-PROFIT

1:45 PM INDUSTRY EXPERT: HEDGE FUND INVESTING

How To Use Wide Range of Strategies, Including Borrowing & The Trading of Nontraditional Assets, To Earn Above-average Investment Returns

TRACK 2: MID TO SMALL FOUNDATION, ENDOWMENT & NOT-FOR-PROFIT

1:45 PM CASE STUDY: FIXED INCOME ALLOCATION

Rethinking Fixed Income Allocations in Today's Market



AGENDA - DAY 1

Wednesday, March 5, 2025

In search of generating alpha, hedge fund investors are expected to maintain or increase their hedge fund exposure. As investors search for more uncorrelated investment strategies, hedge funds are a viable option. Though the risks are higher, the potential for high rewards is very attractive. Uncover:

- The current state of the hedge fund industry
- Strategies that provide the most value to diversified portfolios
- Investment trends to watch

Utilize borrowed funds wisely to amplify investment gains, with careful risk management to avoid potential losses and ensure long-term financial stability.

CIDEL

In the “new normal” of lower interest rates, investors have been readjusting their fixed income allocations. Given the large fixed-income allocations in most institutional portfolios, it is critical to update bond allocation to bring balance and better long-term outcomes. Create a roadmap to:

- Readjusting fixed income allocation
- Exploring the most worthwhile strategies
- Examining the risks and opportunities presented by different sectors

Reassess fixed income strategies in light of fluctuating interest rates, considering shorter-duration bonds and inflation-linked securities to mitigate interest rate risk.

2:15 PM CASE STUDY: BALANCING MISSION-RELATED INVESTMENTS (MRI) AND RETURNS

Promote long-term social impact through intended investment & generate measurable social or environmental benefit and a financial return

Foundation and endowment investors are increasingly pressured to align their investments with their missions, whether through mission-related investing (MRI) or program-related investing (PRI). Design your investment strategy that yield the same financial returns as traditional investments. Create an action plan to:

- Align mission-driven investments with financial performance can enhance both impact and profitability.
- Evaluate the social and environmental impact of MRI, enabling better decision-making and reporting.
- Balance mission and returns, highlighting best practices and lessons learned.

Equip participants with knowledge to navigate the evolving investment environment in MRI landscape

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

2:45 PM INDUSTRY EXPERT: THE VALUE OF DIVERSIFICATION

How to Find the Right Strategies for Your Portfolio

Diversification is the process of allocating assets across a range of different strategies to optimize returns when experiencing different macroeconomic environments. It is often referred to as the only “free lunch” when it comes to investing. Sounds good in theory, however it is crucial to explore:

- How diversification works
- What type strategies are considered diversifiers
- The different dynamics for each strategy.

Peter Muldowney, Head of Institutional & Multi-Asset Strategy, *CC&L Financial Group*
Anish Chopra, Managing Director, Portfolio Management Corporation & Investment Committee member, *Lawson Foundation*.

3:15 PM NETWORKING & EXHIBITOR LOUNGE: CONSULT INDUSTRY EXPERTS

- **Source invaluable insight** and experience the next level of investment innovation first-hand.
- Connect one-on-one with leading asset managers to **overcome investment hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

3:30 PM ASSET ALLOCATION ROUNDTABLES

Discover the benefits and risks of various assets classes and how they can impact your portfolio for the better. Portfolio diversification is essential for higher, sustainable returns. Don't miss this unique opportunity.

1. **Fixed Income:** Investments that provide regular income through interest payments, typically considered lower risk than equities.
2. **Alternative Investments:** Diverse assets outside traditional stocks and bonds, including hedge funds, venture capital, and collectibles, often aimed at higher returns and lower correlation.
3. **Multi-Asset Funds:** Investment funds that allocate capital across various asset classes to optimize risk and return based on market conditions.
4. **Real Estate:** Tangible property investments that generate rental income and potential appreciation, serving as a hedge against inflation.
5. **Private Equity:** Investments in privately held companies, aiming for long-term growth and often involving active management to improve performance.
6. **Commodities:** Physical goods like oil, gold, and agricultural products, traded on exchanges, often used to hedge against inflation and diversify portfolios.
7. **Infrastructure:** Investments in physical assets like roads, bridges, and utilities, providing essential services and stable cash flows.
8. **Private Debt:** Loans provided to private companies or projects, typically offering higher yields compared to public debt instruments.

4:00 PM FORTHLANE OCIO

4:30 PM CLOSING FIRESIDE KEYNOTE: PANEL: NAVIGATING LONG-TERM VISIONS AND SHORT-TERM FUNDING DEMANDS

Long-Term Horizon vs. Short-Term Funding Needs

While endowments and foundations typically invest with long-term horizons, short-term funding needs for operations, grants, and programs can create challenges in portfolio management. Create an action plan to:

- Protecting long-term capital and meeting immediate funding needs
- Pronouncing the needs clearly during periods of economic downturn or heightened market volatility.
- Avoid leading to liquidating assets at suboptimal times.

Donna Ziegler, Executive Director, *South Saskatchewan Community Foundation*
Adam Hicks, Director of Finance and Strategic Initiatives, *South Saskatchewan Community Foundation*



AGENDA - DAY 1

Wednesday, March 5, 2025

5:00 PM CLOSING COMMENTS FROM YOUR HOST

Review the key solutions and takeaways from today's sessions. Source a summary of action points to implement in your work. Discuss tomorrow's highlights!

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 at our **Reception Gift Giveaway**.
- 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!

6:30 PM CONFERENCE ADJOURNS TO DAY TWO



AGENDA - DAY 2

Thursday, March 6, 2025

7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **investing leaders**.
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8:45 AM OPENING COMMENTS FROM YOUR HOST

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9:00 AM KEYNOTE PANEL: DEVELOPING POLICY & STRATEGIC PLANS

How to Find your Next High-Growth Investment Opportunity

Develop a strategic plan with a supporting policy to formalize your investment process. Perfect your plans to find high growth opportunities and invest while using less resources. Create a roadmap to:

- See gaps in your capacity and knowledge and how you can use volunteers to reduce resource consumption.
- Increase your standardization, so you can easily define and achieve your goals.
- Align your investment process to your mission values.

Enhance your policy standardization, reducing resource consumption and improving investment success.

Frédéric Gauvin, M Sc., CFA, President and Chief Investment Officer, *Université de Sherbrooke*
Michael Cheong, CFO, *United Way Greater Toronto*

9:30 AM C-SUITE EXCLUSIVE FIRESIDE: MEASURING VALUE BEYOND PROFIT

Seizing the Opportunities in Impact Investing

On a mission to drive social and environmental change, a growing number of foundations and endowments have directed a significant amount of capital to impact investments. With the benefits of supporting communities and addressing global challenges, the field continues to expand rapidly. Walk away with an actionable strategy on:

- How foundations and endowments are approaching impact investments
- Pinpointing opportunities to reap social, environmental and financial rewards
- Calculating the value of impact investments

Evaluate the multifaceted impact of investments and develop metrics that demonstrate the true value of your impact portfolio.

Angela Chapman, CEO, *VGH & UBC Foundation*
Stephanie Kremer, Director, Private Wealth sales, *Trans-Canada Capital*
Sarah Charters, CEO, *United Church of Canada* MODERATOR

10:00 AM INDUSTRY EXPERT: MASTERING THE OUTSOURCED CIO PARTNERSHIP

Outsourcing the CIO Role: Fundamentals to Ensure a Winning Partnership

Outsourcing the CIO role is growing in popularity as endowments and foundations seek more sophisticated investment expertise and skill to extract maximum value from their investments. Shifting some of the authority for investment decisions to external providers, eases the challenging task of juggling fiduciary responsibilities and investment management. Before exploring and outsourcing concept, take careful considerations on:

- Selecting the right third-party advisor to partner with
- Top approaches to ensure smooth implementation
- Key ingredients for a successful OCIO Program

Implement an outsourced CIO program, focusing on clear communication, governance structures, and the essential elements that contribute to a thriving investment strategy.

10:30 AM ROUNDTABLES DISCOVER THOUGHT-PROVOKING IDEAS

Roundtable 1: -5M Assets Under Management

Meet with your peers, to understand how to mitigate the unique challenges you face, such as labour shortages, resource allocation, building governance and frameworks, due diligence and more.

- Labour Shortages: How to do more with less people.
- Resource Constraints: Navigate financial markets and keep costs down.
- Frameworks: Build structured plans to help reduce due diligence needed.

Roundtable 2: 5M-550M Assets Under Management

As foundations get larger, more engagement between your managers, OCIO's, RIA's and investment committee is essential to ensuring that the correct work of due diligence and risk management is carried out effectively. Come together with your colleagues to collaborate on exactly how to solve these issues.

- Regulatory Compliance: Assess the new disbursement quotas.
- Investment Styles: Dissect in-house vs OCIO set-ups.
- ESG Investing: Review the extent of new sustainable investment trends.

Roundtable 3: 550M and above Assets Under Management

As larger foundations become more established with their investment committees and staff, they need a more sophisticated understanding of investment. Grasp the nature of each asset class, so they can contribute to your investment success as a foundation.

- Asset Allocation: Stress test each asset class and your total portfolio.
- Wealth Preservation: Inflation proof your investments.
- Risk Management: Identify previously hidden risks to protect your assets.

11:15 AM SPEED NETWORKING IN EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Browse different sponsor booths and **gain institutional investment expertise**.
- Take advantage of **event-specific offers** and special content.
- Schedule **one-to-one private meetings** for personalized advice.



AGENDA - DAY 2

Thursday, March 6, 2025

TRACK 1

12:00 PM SPOTLIGHT: ETHICAL INVESTMENT TRADE-OFFS

Donor Pressure and Stakeholder Expectations

Donors, alumni, and other stakeholders increasingly expect foundations and endowments to reflect certain ethical or social values in their investment strategies, such as divesting from fossil fuels, promoting racial equity, or supporting gender inclusion. Adapt best practices to:

- Taking difficult decisions, as some of these investments may not align with traditional risk-return models.
- Evaluating the potential trade-offs between aligning with stakeholder values and maintaining traditional risk-return profiles, ensuring informed decision-making.
- Balancing ethical considerations with financial performance, allowing foundations to meet stakeholder expectations without sacrificing returns.

Communicate your investment approach to stakeholders, fostering transparency and building trust while addressing their concerns.

Ratan Akash, Audit and Finance Committee, *Surrey Hospitals Foundation, BC College of Pharmacists*

TRACK 1

12:30 PM THE BUSINESS CASE FOR INVESTING IN NATURE

A growing number of Canadian businesses are recognizing that investing in nature isn't just a moral imperative, it's good business. Protecting and restoring nature improves corporate resilience, offers a first-mover advantage as global regulators, including those in Canada, make disclosure on nature-related impacts a priority and can spur innovation to develop new products and services that have a smaller environmental footprint.

TRACK 2

12:00 PM PRESENTATION:

How Should E&Fs Leverage Alternatives to Meet Their Goals

- What are the strengths and drawbacks of different alternatives for the portfolio
- How to identify the right strategic asset mix between traditional assets (e.g. equities, bonds) and various alternatives
- Are there any investment management models which have worked particularly well for endowments? (e.g. Swensen model, Maple model)
- How to think about partnership with GPs and service providers in alternatives

Michael Ashmore, Chair, Finance & Investment Committee, *University of Waterloo*

TRACK 2

12:30 PM PANEL: NAVIGATING DIVERSE PERSPECTIVES

Building Networks Is Essential to Investment in Social Impact Bonds

For success in working in collaboration it is important to have conversations among foundations, community development financial institutions, and investment firms about social impact bonds and pay for success. Out of these conversations, master success factors on:

- Why investing in nature is a financial imperative
- How nature-based solutions can help mitigate business risks and offer opportunities for innovation
- An action plan for including biodiversity in your ESG strategies
- Networking for success: building networks is essential to investment in social impact bonds.
- Investing for success: Policy questions raised by social investors.
- co-invest in a larger or more complex social impact bond transaction: Different appetites for risk, organizational cultures, expectations of return on investment, and different motivations for considering investing in each social impact bond transaction.

Vince Gasparro, Canada Board Member, *WWF*
Kathrin Majic, Canada SVP, Development *WWF*

Identify and address the varying risk appetites, and investment motivations of co-investors, facilitating smoother partnerships and successful transactions in complex social impact bond deals

Judy Zhu, Executive Director, *Royal Columbian Hospital Foundation*

1:00 PM INDUSTRY EXPERT: MAXIMIZING DONATIONS WITH NEW CRA LEGISLATION

Increasing who you can Donate to with New CRA Legislation

New legislation at government level allows donations to be passed to non-recognised charities. Amplify your ability to give to your cause by using this increased pool of potential recipients. Walk away with an action plan to:

- Increase your recipient network, so you can give to those doing the best work.
- Reduce the burden of new rules around grants, allowing you to donate more quickly.
- Adapt to new potential legal costs, so you can get a realistic picture of what they might be.

Increase your recipient network to those who are doing the best work, encouraging more future donations.

1:30 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.
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2:30 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

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AGENDA - DAY 2

Thursday, March 6, 2025

3:00 PM CASE STUDY: UNLOCK REAL ESTATE POTENTIAL

What Economic Factors Contribute to Stability of a Real Estate Investment

Trends in Residential Real Estate Investing are worth considering. Create a strategy to identify:

- Economic factors/indicators that affect real estate investing.
- Valuation of real estate – methods and why it's important.
- Good opportunity for institutional investors.

Make informed decisions based on key economic factors and their impact on real estate investment.

Andy Sullivan, VP, Asset Management, *YWCA of Southwestern Ontario*

3:30 PM FIRESIDE: ALTERNATIVE INVESTMENTS AND INCREASED USE OF PASSIVE INVESTMENT

When you look at the large shifts in institutional investing you see the move to alternative investments, the use of OCIO, the incorporation of DEI and ESG. Now it looks like the next paradigm shift will be the increased use of passive investments for marketable investing. Many institutional investors are having difficulty in hiring global equity managers that will outperform an index, whether it be ACWI or S&P. Navigate through the process of:

- Advantages and disadvantages to investing in an index
- More advantages than compensate for the disadvantages

Jeffrey Haber, Sr. Director, Finance, *Commonwealth Fund*

4:00 PM NETWORKING & EXHIBITOR LOUNGE: CONSULT INDUSTRY EXPERTS

- **Source invaluable insight** and experience the next level of investment innovation firsthand.
- Connect one-on-one with leading asset managers to **overcome investment hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

TRACK 1: ALIGNING INVESTMENT PRIORITIES

4:30 PM CASE STUDY: MOBILIZING YOUR CAPITAL

Removing Barriers to your Cause

Getting fund managers to focus on your investment area can sometimes be quite tricky, especially if it's niche, or there are barriers to entry for funding. Overcome these barriers and put your cause first, so you can increase funding in your area. Take away practical solutions to:

TRACK 2: DEFINING IMPACT & ESG

4:30 PM CASE STUDY: ESG AND IMPACT INVESTING MANDATES

How To Strategically Integrate ESG

There is growing demand for foundation and endowment portfolios to incorporate environmental, social, and governance (ESG) criteria and pursue impact investing strategies that generate social and environmental benefits alongside financial returns. Transform your investment strategy by:

- Revolutionize your relationship with your fund manager to ensure your investment is going exactly where you want it to.
- Align your investment committee with your mission statement, removing room for confusion.
- Hear a case study on real estate and find out how to deal with technical and legislative barriers to sustainable buildings without harming returns.
- Integrating ESG and impact investments into portfolios without compromising returns with sophisticated analysis
- Improving data quality and standardization of ESG metrics that remain problematic.
- Enabling trustees to address the challenges of balancing ESG priorities with their fiduciary responsibilities.

Produce innovation and impact, even in more difficult investment environments.

Improve the quality and standardization of ESG metrics, ensuring that financial returns are maintained while achieving social and environmental goals.

5:00 PM CLOSING KEYNOTE:

Ongoing updates to securities laws have rendered a number of charitable deposit programs out of compliance with the regulations required by those laws.

- During 2019 and 2020, some Provincial Securities Commissions focused much more intently on these types of programs, prompted by a recent failed faith-based extension fund.
- The evolved regulations encompass all organizations that accept security-like deposits of any kind.
- Exemptions or 'loopholes' are actively being eliminated, therefore seeking special relief from securities regulators is slow, costly, and ultimately likely to be futile.
- As time marches on, the regulators will be less willing to grant grace for non-compliance and are stepping up stringent oversight.
- Hear the story of how one organization with approximately \$115 Million under administration dealt with this issue.

Meynard Wiersma, Executive Director, *Christian Stewardship Services*

5:30 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.

5:45 PM CONFERENCE CONCLUDES



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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

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:

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Early Bird Offer <small>(Offer ends January 24, 2025)</small>	\$1,295
REGULAR TICKET IN PERSON	\$1,795

Early Bird Offer <small>(Offer ends January 24, 2025)</small>	\$1,095
REGULAR TICKET VIRTUAL	\$1,495



GROUP RATES

To check if you are eligible for a group rate, please contact:

Sam Caskey
Delegate Sales Executive
Email: sam.caskey@strategyinstitute.com