



PRESENTED BY: THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

FAMILY OFFICE SUMMIT 2025

WEDNESDAY, APRIL 23 &
THURSDAY, APRIL 24



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Claude Perron
Founder and President
of FIAM



James Burron
Founding Partner
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OUR MISSION

To position Montreal as a key player within the global network of innovation in the development and application of AI/ML technology for finance and asset management.

FLAGSHIP EVENTS & INITIATIVES

- **FIAM Gatherings**
Our signature event, a hybrid of high-level conference and relaxed summer social event (the Méchoui), brought together over 400 participants from 180+ organizations last year.
- **The McGill-FIAM Asset Management Hackathon**
An industry-academic initiative cultivating top talent for a data-driven era, in collaboration with McGill University Desautels Faculty of Management.

LOOKING AHEAD

FIAM remains committed to its long-term vision: positioning Montreal and Canada as global hubs for financial innovation in AI and machine learning.

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to learn more



ABOUT CAASA

INCLUSIVE, ACTIVE, AND PAN-ALTERNATIVE

The Canadian Association of Alternative Strategies & Assets (CAASA) was created in response to industry requests for a national group to represent the Canadian alternative investment participants, including investors, asset managers, and service providers. CAASA is **inclusive** in that it welcomes participation from all companies active in the space as well as select individuals (those with investors) who might want to participate in committees and working groups - or simply attend member events - without their employer being a member of the association. CAASA is very **active** in both committees & groups and events: 10 conferences in 2023 consisting of 73 panels, 21 in-person events, and 16 webinars as well as publishing 4 papers and attending 29 third-party conferences throughout the year. **Pan-alternative**, for CAASA, encompasses all alternative strategies and assets including: hedge funds / alternative trading strategies, private and public real estate (funds and direct), private lending, private equity, development & project finance, digital assets / cryptoassets, weather derivatives & cat bonds, and all aspects of diligence, trading, structuring, dealing, and monitoring alternatives in a stand-alone portfolio and as part of a larger investment strategy.

MEMBER BENEFITS

Investors join CAASA to be a part of a formal network of pension plans, foundations, endowments, sovereign wealth funds, and family offices to discuss ideas, strategies, and operational issues particular to their businesses - all within a closed group where managers and service providers may or may not be included, depending on the forum.

Managers see the association as a way to connect with peers, investors, and service providers to speak to fund structuring, sales & marketing, and regulatory issues. CAASA is not a capital introduction platform, but we do create forums where investors and managers can meet organically or via structured meeting sessions where participation by the investors is strictly opt-in.

Service providers participate in our events and working groups as well as assist in the production of thought leadership pieces which provide relevant information to both association members and the industry and investing public at large.

Founders participate in our Founders' Pitch Competitions as well as other initiatives created to propel their fledgeling businesses forward.

NATIONAL AND GLOBAL

CAASA believes that the Canadian alternatives industry has a great deal to offer Canadians and the global community. The *Canadian Model of Pension Management* is well-known for its large alternatives focus, managed in-house in many cases with substantial allocations to external managers as well. Canadian investment managers operate in a robust regulatory regime (of hedge fund managers) that is becoming the norm across the globe and a stable banking backdrop that provides solace for investors as well as opportunities for managers. Talent in investment management (approximately 10% of all CFA charterholders reside in Canada) as well as newer areas such as digital assets and robo-advisory services are a differentiator. Of course, Canadian investors and managers are keen to learn of best practices in operations and portfolio management from their global peers.

WHY JOIN?

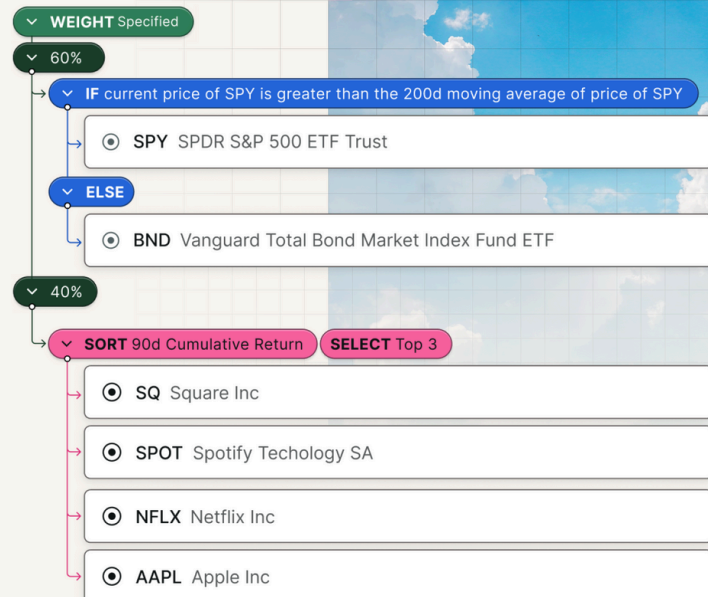
Founded in 2018, we stand at 400+ members and their motivations are plentiful and varied. Whether an investor, manager, or service provider, some seek a group of like-minded individuals in the alts space to connect with on an on-going and (semi-)structured basis; others have a more commercial interest in that they are intent upon being aware of the newest trends in the industry and (providing they have one) presenting their knowledge to an audience of peers; and others have made their mark (or are on their way to doing so) and really just want to give back to a group of people that has done a great deal for them. Whatever your motivation, if you're not in membership yet we'd love to hear from you!

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TÊTE-À-TÊTE MEETINGS

This is your opportunity to schedule one-on-one meetings with any conference delegate. All matching is best completed by end of day on April 22nd to ensure the scheduling software has time to confirm the meetings and each one is served up to you at the right time.

You can schedule as few or as many meetings as they might like. Over the years we received feedback that these are possibly the best part of our conferences as it gives folks an opportunity to connect away from the scheduled panels and meal times and really drill down into their respective interests. The software automatically suggests times that are mutually convenient for both parties.

Anyone can book a meeting with any other delegate. Please decline meetings that you might not be interested in or able to commit too - then the other party can invite another to chat. And if you are interested, you're free to connect via our messenger or email (we do not release delegate emails or other contact information, so you'll have to ask for it or send yours along to them and await a response).

All meetings will be scheduled via our conference app and web portal. Meetings are best booked by noon on Tuesday, April 22nd to both parties accept the meeting. Delegates are free to have ad hoc chats as well, of course, during the course of the conference at the venue.

TABLE TALKS

We do not sell paid-for speaking spots, preferring delegates to choose when they might like to hear from sponsors. Table Talks are 45-minute sessions where anywhere from 2 to 12 delegates can get a briefing on a topic and participate in an interactive discussion. As with all of our events, we refrain from pay-to-play and draw all speakers from membership and prefer audiences to opt-in to more niche discussions, as will be delivered at the Table Talks.

Attendees can choose up to two sessions out of those offered on the day of the conference. **Titles/ topics of each session will be published on our conference app and web portal, also where attendees will register for their desired sessions. This should be completed by noon on Tuesday, April 22nd to ensure a table is not fully-booked, or delegates can simply sit at any of the open tables at those times.**

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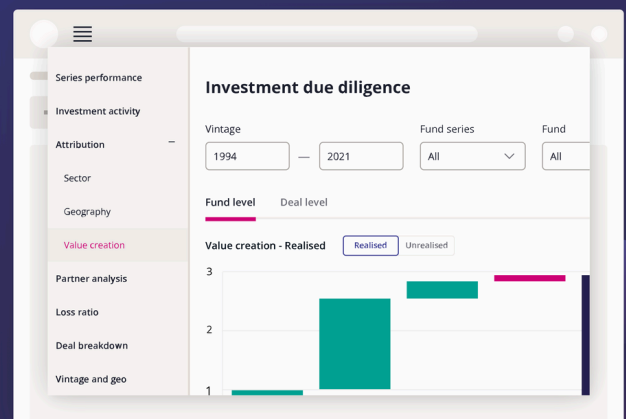
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WELCOME TO OUR IN-DEPTH LOOK INTO FAMILY OFFICE ISSUES

The CAASA Family Office Summit brings together speakers and participants from single and multi-family offices, investment dealers, Canadian and global investment management houses, and affiliated service providers. Panels and break-out sessions will focus on key issues facing family offices in Canada and elsewhere including structuring, legal & tax issues, IT and operational areas, and investments - including: hedge funds, CTAs, private equity, private lending, real estate, infrastructure, and crypto-assets/blockchain-related investments. All content is subject to Chatham House Rule.

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Years in business

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- > Professional accountants & firms
- > Wealth technology firms

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FAMILY OFFICE SUMMIT 2025

WEDNESDAY, APRIL 23RD AGENDA

2:00 PM	Single Family Office Roundtable (Relatives Only) Life as the principal of a family office can be exciting, inspirational, and busy, while at the same time worrisome, stressful, and draining. We provide this (strictly!) family members only session as an opportunity to meet with your peers and share questions, concerns, solutions, and insights across the table. We have nominated three leaders/instigators to get things going and guarantee that all will find the evening illuminating and fun. Jamie Biddle, Verdis Investment Management, John Hynes, HedgeFacts, Lois Tullo, The Global Risk Institute, Shael Soberano, Sharno Group Stephen Bloom, Batl Capital
2:00 PM	Single Family Office Roundtable (Professionals Only) Working in a single family office is not your typical investment management job – you gain the benefit of a sometimes extremely flat organizational structure and many find the spectrum of duties and tasks to be (very) intellectually stimulating. On the other hand, it can be isolating and difficult to keep up with the pace of work: each family has its own dynamic and cadence so we created this session where (strictly!) full time employees (not relatives) of SFOs can interact with their peers to get the most out of their roles. Trevor Maunder, Peerage Capital, Tec Han, SFO Professional, Andrew Garrett, Spotlight Development, Andrew Hamlin, Federated Capital
3:30 PM	<u>Break Out Session 1</u> Option 1: Portfolio Diversification in Challenging Markets Option 2: Multi-Generational Plan for Multi-Generational Wealth (Family Members Only) Option 3: Family Office Operations: Best Practices
4:15 PM	<u>Break Out Session 2</u> Option 1: Investing in Private Markets & Venture Capital Option 2: Due Diligence for Families Option 3: Tax Planning & Cross-Border Issues
5:00 PM	Welcome Reception (All Delegates) A special reception for all our delegates attending the Summit.

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SAVE THE DATE for the 15th Canadian Alternative Investment Forum [CAIF] being held
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Hold your spot to **SPONSOR** or **ATTEND** early by emailing Tori at tbrown@introcap.com

FAMILY OFFICE SUMMIT 2025

SINGLE FAMILY OFFICE BREAK OUTS

Break Out Session 1A	Portfolio Diversification in Challenging Markets This discussion will cover investment strategies, alternative asset classes, and how to balance risk and return in today's volatile market. Jay Rosenfeld , Peerage Capital & Artemis, Edwin Wong , Chandaria Family Holdings
3:30 PM	
Break Out Session 1B	Multi-Generational Plan for Multi-Generational Wealth (Family Members Only) This session will focus on purpose and accountability and explore strategies to ensure smooth leadership transitions, the role of next-gen family members, harmonious family relations, and maintaining the family's values and vision across generations. Shael Soberano , Sharno Group, Robert Reichmann , ReRo, John Hynes , Hedgefacts
3:30 PM	
Break Out Session 1C	Family Office Operations: Best Practices What are the most efficient and effective ways to run a modern family office? This session will explore operational best practices including staffing, data management, reporting, and compliance—while also discussing how digital tools and technology can enhance efficiency, security, and scalability. Lois Tullo , The Global Risk Institute, Drew Colaiezzi , McPike Global Family Office
3:30 PM	
Break Out Session 2A	Investing in Private Markets & Venture Capital This discussion will explore family office investments in private companies, including deal sourcing, due diligence, and the role of venture capital in a diversified portfolio. Russell Deakin , Aceana Group, Drew Colaiezzi , McPike Global Family Office
4:15 PM	
Break Out Session 2B	Due Diligence for Families How can families conduct thorough due diligence on funds and managers? This session will highlight frameworks for avoiding pitfalls and selecting quality partners. Tec Han , SFO, Adrian Barber , Barber and Associates
4:15 PM	
Break Out Session 2B	Tax Planning & Cross-Border Issues With families often spread across jurisdictions, this session will focus on managing tax exposure, estate planning, and navigating complex global tax issues. Jay Rosenfeld , Peerage Capital & Artemis
4:15 PM	

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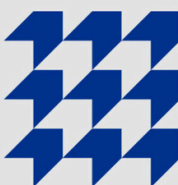
Let's start a conversation.

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FAMILY OFFICE SUMMIT 2025

THURSDAY, APRIL 24TH AGENDA

8:00 AM	Registration & Breakfast
8:30 AM	Wheat From the Chaff: Manager due diligence There are thousands of managers in the alts landscape – some might even think that they have seen them all...until they find dozens more at a new event or database. This session will show new and veteran family office professionals and their families a framework of categorizing, diligencing, and choosing managers which have the best probability to perform according to the needs of the families' beneficiaries. Tec Han, SFO Professional, Adriana Arrillaga, One Summit Capital Wealth Management Inc., Felix Boyer, KPMG Family Office
9:00 AM	Private Markets in Transition Private markets have been all the rage for many years with PE and then venture coming to the fore in retail-friendly wrappers and terms (even if they are at odds with how the industry would traditionally package them). Secondaries have evolved from PE to real estate and now infrastructure secondary funds (designed with the feature/bug that they buy more mature positions and are able to offer better liquidity terms to investors) in very quick succession (the latter of the three offered seemingly just after people started musing about it. Platform proliferation has made accessing these funds easier than ever and allowed capital to flow virtually unhindered into this space. What's next? This panel will discuss just that. Drew Colaiezzi, McPike Global Family Office, Nima Sanajian, Wealthsimple

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FAMILY OFFICE SUMMIT 2025

THURSDAY, APRIL 24TH AGENDA

9:30 AM	Non-correlated Ideas Diversification is touted as the Holy Grail of investing – but one must choose their portfolio constituents wisely. 79 of the NASDAQ 100 constituents are in the S&P 500. Equity and bond indices generally correlate – especially in crisis situations. Even hedge funds and other sectors like real estate can correlate when crowded trades or macro factors align to take them down. Where can an investor find solace? Possibly in the offerings of these three panelists: one's employer has a plethora of non-correlated products on offer (Sagard), one has a fund that is correlated to the EM index which is, itself, a diversifier to other assets and strategies (Letko Brosseau), and the third has digital assets at its core (3iQ Corp). Rohit Khuller, LetkoBrosseau, Adam Vigna, Sagard Holdings, Pascal St-Jean, 3iQ, Loïc Julé, Richter
10:15 AM	Table Talks Round table discussions hosted by our Sponsors. This session is aimed at providing all event attendees with the ability to join in genuine knowledge exchange and discussion in a small group setting. Choose from any of the topics for these 45-minute sessions
11:00 AM	1:1 meetings / Morning Refresher This is everyone's opportunity to meet – either as established via our conference meeting & messaging app or ad hoc

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FAMILY OFFICE SUMMIT SPONSOR TABLE TALKS

10:15 AM - 11:00 AM**1.**

Asset Management One USA
An Introduction to Asset
Management One USA



Mark Tower
*Executive Director,
Head of Business
Development*



**Anne-Sophie
van Royen**
Chief Investment Officer,
Quantitative Strategies

Asset Management One USA inc. is part of Tokyo based Asset Management One Group, which was established in October 2016 through business integration of DIAM Asset Management, Mizuho Trust & Banking (asset management department), Mizuho Asset Management and Shinko Asset Management. Asset Management One USA Inc. manages approximately \$7.1 billion on a discretionary basis, and provides various non-discretionary advisory, consulting and monitoring services on approximately \$14.7 billion in assets for institutional clients via various investment functions such as Quantitative Investment Strategies, Equity Investments, Fixed-Income Investments, etc. (AUM/AUA as of 12/21/2024)

2.

3iQ
Next-Gen Alpha: Liquid
Alternatives in the Digital
Asset Era



Pascal St-Jean
President & CEO

Accessing leading alternative asset managers to incorporate into private client portfolios was previously challenging with many of these vehicles having high investment minimums and/or being offshore with manual processes and tax nuances. iCapital's solution has already launched 60 funds locally in market (structured as domestic vehicles and all on Fundserv at very compelling near institutional pricing) and opens up a broader tool kit for wealth managers to enhance diversification, increase alpha and income and downside protection in their client portfolio.

3.

AGF Capital Partners
Topic TBA



Eamonn McConnell
*Senior Managing
Director*



Jessica Salvador
Principal

4.

Capital Direct Management Ltd.
An Alternative Approach to
Fixed Income



Gord Ross
*Senior Vice
President, Sales for
Central Canada*

A discussion focused around how Canadian investors can generate consistent, dependable income by including this well-diversified portfolio of Canadian residential mortgages in their investment portfolios.

5.



Capital Fund Management
Scalable Hedge Fund Alpha:
Innovation in Data and AI



Martin Jost
*Quantitative
Portfolio Specialist*

Advances in artificial intelligence and alternative data are transforming the investment landscape. See how the latest developments are being applied in sophisticated quantitative hedge fund strategies, and what the outlook is for this fast-moving frontier.

6.



iCapital
Facilitating Access to Leading
Managers for Private Wealth
Investors



Tony Mallozi
Senior Vice President

Accessing leading alternative asset managers to incorporate into private client portfolios was previously challenging with many of these vehicles having high investment minimums and/or being offshore with manual processes and tax nuances. iCapital's solution has already launched 60 funds locally in market (structured as domestic vehicles and all on Fundserv at very compelling near institutional pricing) and opens up a broader tool kit for wealth managers to enhance diversification, increase alpha and income and downside protection in their client portfolio.

7.



Preqin
Fundraising Update in
Canada



Jordan Villarreal
*VP, Business
Intelligence*

We will be taking a look at fundraising trends in Canada as they emerge and investor sentiment from Preqin's most recent investor survey as dry powder starts to get deployed.

8.



RBC Investor Services
The future of family offices:
Rising investment preferences



Sylvia Rizk
*Senior Director,
Business Development*

Which investment themes and asset classes will deliver strong short-term returns and attract long-term growth?

9.



Walton Global
How to access Portfolio Growth
from the U.S. home-building
deficit with a land-light strategy



Tony Deegan
*Sr. Vice President of
Capital Markets*



Justin Creamer
VP Capital Markets

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FAMILY OFFICE SUMMIT 2025

THURSDAY, APRIL 24TH AGENDA

11:30 AM	Getting to G10 We have hosted numerous sessions where families and their professionals blue sky ideas on how to make their family office run better – but, as with most things, it comes down to people (this is the good and bad news). At the end of the day, G+1 or 2 or 3 will pass on and their legacy will be in th hands of the next generations. Now, one can live a lifestyle exclusive of worry about the next generation, but many believe that they'd like their progeny to do at least as well as they did. The math is difficult, though...exponential beneficiary growth meets arithmetic portfolio growth; and add to that missteps that the guardians of the hoard might make and 'getting to G10' can seem a gargantuan task. This panel will show you all sides of this conundrum and give you actionable tasks to make your heirs better off. Geraldine Hardy, Family Hippocampus, Jamie Biddle, Verdis Investment Management, Sean Driscoll FAX Capital, James Burron, CAASA
12:15 PM	Lunch is served
12:45 PM	Lunch Keynote: Martin Lueck: Delivering non-correlated, liquid alpha for decades Mr. Lueck may not be known to all – his forte is discovering and exploiting trading opportunities and longer-term price trends that can create value for his many investors. His experience stretches about 40 years and his namesake first big win (AHL Fund, wherein he is the 'L') along with his current company (Aspect Capital) continue to be beacons of performance and innovation for the industry. Plase join us in this perhaps once-in-a-lifetime opportunity to hear his story and how he has managed to provide returns for investors in all markets as well as create and build relatinonships with investors over the years. Martin Lueck, Aspect Capital Limited, Nancy Bertand, Citi Private Bank, Canada

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FAMILY OFFICE SUMMIT 2025

THURSDAY, APRIL 24TH AGENDA

1:30 PM	How much Alpha is enough? How many yachts? Family offices are unique: they are a compilation of the family members (usually the founder/G1 is the main driving force behind this, but more mature families have successive generations represented in the Investment Committee) and their professional (non-related) staff. Unlike more institutionalised roles, that of an SFO professional is usually more dependent on the preferences of the beneficiaries involved in the process vs the process itself. This can be liberating (only one politic to worry about) or not (overbearance). Then there are the expectations, which this panel will focus on. Both of our speakers work for an involved G1 and their progeny (to an extent) and other advisors/professionals – but the expectations of them are very different. This will be an interesting illustration of how families of the same vintage can differ! Scott Morrison, Wealhouse Capital Management, Trevor Maunder, Peerage Capital, Jason Campbell, Eckler
2:00 PM	Total Portfolio Allocation Every once in a while there is an epochal change in how things are done. One can observe an industry for years, piecing together many participants' actions, before stepping back to see what the mosaic illustrates. The Total Portfolio Approach is one of those paradigm-changing (or shifting) mindsets. Institutional investors always seek additional alpha or risk-adjusted return, or (to be simple) ways to deliver value (e.g., retirement income) to their beneficiaries. The Maple Model is another example of this – but it is almost impossible to implement for smaller (<\$10 billion) investors. The panel will explain the TPA and how it can be implemented by other investors to help them reach their lone-term goals. Attendees are encouraged to read ahead prior to the event by perusing (or at least scanning) this CAIA paper on the topic [link]. Robert Wilson, Picton Mahoney Asset Management, Steven Novakovic, CAIA Association, Jeff Noble, BDO
2:30 PM	Table Talks Round table discussions hosted by our Sponsors. This session is aimed at providing all event attendees with the ability to join in genuine knowledge exchange and discussion in a small group setting. Choose from any of the topics for these 45-minute sessions

FAMILY OFFICE SUMMIT SPONSOR TABLE TALKS

2:30 PM - 3:15 PM**1. Aspect Capital**
The Science of Investment**Martin Lueck**
*Founder & Research
Director*

Systematic strategies are adaptable, agile and resilient: ideal characteristics for trading in a divergent macro economic environment like we are witnessing today. By combining scientific principles and leading-edge technology, these liquid strategies aim to provide diversifying source of returns that are uncorrelated to major traditional asset classes

2. Composer
Composer
Modern Portfolio Construction with
Automated Strategies: Simplifying
Quantitative Trading for Family
Offices**Erin Self**
*Head of Major
Account Sales*

Quantitative trading has been a significant factor in Wall Street's operations, but it's often not accessible for family offices. Composer aims to make it more accessible. Discover how lean teams can seamlessly build, test, and automate trading strategies in-house — no coding, quant expertise, or complex infrastructure required.

3. KPMG | FAMILY OFFICE
KPMG Family Office
Independent, Integrated,
Institutional**Félix Boyer**
*Executive Director,
Family Office*

Explore the essential roles of independent, integrated, and institutional approaches in Family Office investing. This session will highlight how these three elements work together to enhance investment strategies, optimize performance, and ensure long-term success in managing family wealth effectively. Join us for insights and best practices.

4. MERCHANT OPPORTUNITIES FUND
Merchant Opportunities Fund
High Yield Superior
Liquidity Canadian Small
Business**David Gens**
CEO & Founder**Leyland Gordon**
Marketing Advisor

Unique Canadian SME Lending Proprietary Origination High Yield Monthly Liquidity

5.



Nomos Capital
Canadian Litigation Finance,
Uncorrelated Alpha



Ezra Siller
Managing Director

This talk will cover the litigation finance asset class, an uncorrelated investment strategy, with a focus on the Canadian market

6.



Omnigence
Finding Performance in a Low-
Growth, High-Inflation, and
Tariffs-Driven Era



Jonathan Planté
*Director, Capital
Markets*

In an era marked by higher than usual inflation and slower economic growth, Omnigence focuses on real economy assets that offer structural tailwinds. Concentrating on lower middle market private equity and farmland, the firm targets under-financialized sectors, where fundamentals drive value, and performance is less dependent on macroeconomic cycles.

7.



Picton Mahoney Asset Management
Building Smarter Portfolios: A Total
Portfolio Approach



Robert Wilson
*Senior Vice President, Head of
Portfolio Construction
Consultation Service*

Join Robert Wilson as he explores the Total Portfolio Approach and how 2ND ENGINE, a division of Picton Mahoney Asset Management, can help optimize risk and return for portfolio construction. Gain insights on risk-based prospecting and incorporating alternatives within a goal-based investment framework to build more resilient portfolios for today's market.

8.



Richter Family Office
Family office trends during interesting
times



Athas Kouvaras
*Client Relationship and
Development Manager,
Portfolio Manager*

May you live in interesting times is an ironic expression that perfectly captures the zeitgeist of the world at large. While we are coming off two consecutive robust equity market years, we entered 2025 with arguably elevated valuations in multiple risk markets and are now facing tremendous uncertainty via Trump's tariff regime and continued geopolitical concerns. Moreover, the stunning amount of capital that was allocated to private markets over the past few to several years along with the drying up of exits and distributions has resulted in too much dry powder on the GP side and portfolio construction issues on the LP side. This table talk session will focus on family office investment trends during this "interesting" investment environment.

9.



Virgo Digital Asset Management
Integrating Digital Assets into HNW
Portfolios: Balancing Risk,
Unlocking Opportunity



Kevin Jiang
CIO & Interim CEO



Adam Cai
Chairman

This session explores how digital asset strategies can enhance HNW portfolios by capturing asymmetric return potential while managing volatility. We'll cover their role as growth accelerators, using options for income and risk control, and the case for active vs. passive exposure, highlighting how leading allocators are navigating this evolving and dynamic asset class.

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FAMILY OFFICE SUMMIT 2025

THURSDAY, APRIL 24TH AGENDA

3:15 PM	Tete-a-Tete / Afternoon Refresher This is everyone's opportunity to meet – either as established via our conference meeting & messaging app or ad hoc
3:45 PM	Cross-Border Currents: The Evolving Canada-U.S. Relationship In an increasingly interconnected and politically dynamic world, the relationship between Canada and the United States remains critical for families, businesses, and investors on both sides of the border. Greg Valliere, Chief U.S. Policy Strategist at AGF Investments, will provide a timely and insightful overview of the current state of Canada-U.S. relations, highlighting key political, economic, and policy developments. From trade agreements and energy policy to regulatory shifts and election cycles, Greg will decode what's happening now – and what's likely ahead – offering actionable intelligence for those navigating cross-border opportunities and risks. Greg Valliere , AGF Investments
4:15 PM	MFO Round-Up A popular panel each year, this year's crop of MFO leaders will discuss their views on the global multi-family office scene; describe, compare, and contrast their client service offerings; and give prescient outlooks on investments and family governance trends. Enjoy! Greg Nott , Northwood Family Office, François Ritchot , Sagana, Ralph Awrey , Stonehage Fleming, Jason Taylor , Climate Finance Advisors
5:00 PM	Closing Reception
7:00 PM	End of Family Office Summit 2025 Thank you!

Flagship Conferences

CAASA ANNUAL CONFERENCE

MONTREAL
November 4-5, 2025

This conference brings institutional investors from across the globe focusing on key issues facing investors and managers in Canada and elsewhere.



Thematic Conferences

START-UP ROUND-UP

TORONTO
May 12, 2025

Bringing portfolio companies/ start-ups in front of VCs, Family Offices, and other investors.



DIGITAL ASSETS DAY

TORONTO
September 16, 2025

The conference will bring together allocators and institutional quality speakers in the digital assets space.



CAASA ALTERNATIVE PERSPECTIVES: PRIVATE MARKETS FOCUS

TORONTO
September 17, 2025

This conference will bring together managers, service providers, and global allocators in the real assets and lending space.



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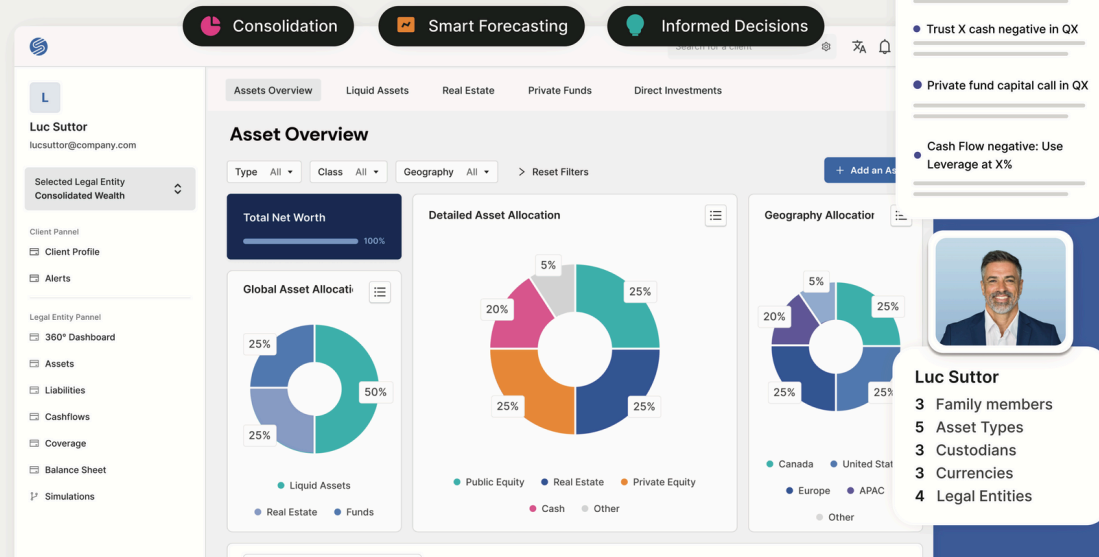
SPEAKER BIOGRAPHIES

Thank you to our many speakers, presenters, and those who added their themes and topics, panel and non-industry speaker ideas, and other invaluable input!

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SCAN ME

KEYNOTE SPEAKER BIOGRAPHIES

Martin Lueck

Co-Founder and Research Director
Aspect Capital Limited



Mr. Lueck co-founded Aspect in September 1997. As Research Director, Mr. Lueck oversees the Research teams responsible for generating and analysing fundamental research hypotheses for development of all Aspect's investment programmes. Mr Lueck is also a member of Aspect's Investment Committee.

Prior to founding Aspect, Mr. Lueck was with Adam, Harding and Lueck Limited (AHL), which he co-founded in February 1987 with Michael Adam and David Harding. Man Group plc (a leading global provider of alternative investment products and solutions) completed the purchase of AHL in 1994 and Mr. Lueck left in 1996. At AHL, Mr. Lueck was instrumental in developing AHL's trading systems and approach to research as well as the proprietary software language that provided the platform for all of AHL's product engineering and implementation.

From May 1996 through August 1997, Mr. Lueck was on gardening leave from AHL during which time he helped establish his wife's publishing business, Barefoot Books. Mr. Lueck was a Director of Research at Brockham Securities Limited, a London-based commodity trading advisor, from October 1984 to February 1987 and an executive in the Japanese Equity Sales department of Nomura International, a provider of financial services for individual, institutional, corporate, and government clients, from January to October 1984. Mr. Lueck serves on the Board of the National Futures Association. He holds an M.A. in Physics from Oxford University and currently serves as Chair of the Oxford Physics Development Board.



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David Gens

Founder & CEO at Merchant Opportunities Fund

NOMOS
— CAPITAL —

SPEAKER BIOGRAPHIES

Adriana Arrillaga

President & Portfolio Manager

One Summit Capital Wealth Management Inc.

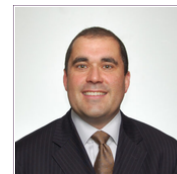


Adriana is President and Portfolio Manager of One Summit Capital. Adriana's extensive career in the investment management industry, includes 15 years as Senior Portfolio Manager with Fleming Asset Management, where she oversaw North American mandates for foreign pension funds. During her career, Adriana worked with institutional asset managers as well as major Canadian Financial Institutions. Adriana is an alumnus of John Molson School of Business, where she graduated with a B. Comm. Finance Major. Adriana is a CFA charter holder and was conferred the FCSI designation (Fellow of the Canadian Securities Institute). Adriana is a member of CFA Montreal, Women in Investment Management Committee, where she leads the Scholarships Selection Committee. Adriana volunteers as a guest speaker at the Goodman Mentor Circle and as guest lecturer at JMSB. Adriana values the importance of women's financial education. In 2018, she established an annual scholarship with Concordia University to help encourage female finance students to pursue their CFA designation. Adriana is a founding member donor of Women Impact Montreal fund. She is voting member of Conservation Manitou. She was a member of Tiger 21 till February 2025. Adriana came to Montreal as foreign student and is a first-generation immigrant to Canada.

Ralph Awrey

Director, Family Office, Canada

Stonehage Fleming



Ralph is Director, Family Office for Stonehage Fleming, based in Toronto. He has more than 20 years' experience working with families and their advisors across the Americas providing strategic counsel, management and implementation covering the full spectrum of a family's wealth requirements. His experience in both living and working internationally allows him to bring the right resources and practical wisdom to help international families manage their wealth and protect their legacy for this generation and those to come.

Stonehage Fleming are valued advisors to the world's leading families and wealth creators. We manage and protect their wealth, across multiple geographies and generations. We work with families to help determine a purpose and strategy for their wealth, providing the platform to protect and manage their assets. This support can vary from a single standalone service to operating as a fully outsourced Family Office. With a seventh generation family at our core, we bring the families we support the benefit of shared experience; the challenges and opportunities they face will often be unique to them, but not to us. We give them the peace of mind and the time to focus on what's most important to them.

Prior to joining Stonehage Fleming, Ralph held a variety of senior leadership roles in wealth management across the Americas with Canadian banks and a Single Family Office. This included a 20-year career with postings in Canada, Barbados, and the Cayman Islands where he also served on the Boards of Delaware and Caribbean Trust companies. Ralph is a Chartered Accountant (Canada), and has a Masters in Business Administration from The Rotman School of Management, University of Toronto, and Honours Bachelor of Arts from Western University.

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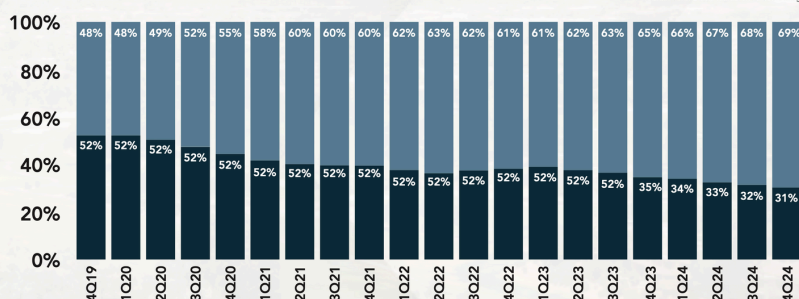
ABOUT WALTON

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APPROX.
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ACRES
UNDER
MANAGEMENT &
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SPEAKER BIOGRAPHIES

Adrian Barber

President

Barber & Associates



Adrian Barber is the President of Barber & Associates(B&A), a single-family office based out of Mississauga, Ontario.

Overseeing a ‘wheel-spoke’ model, Adrian utilizes a range of partners to allow for both operational efficiency as well as best-of-breed execution. Investment management, operations, governance, succession and multi-generational planning fall within his purview. B&A’s portfolio is fully diversified and overweight private markets.

Adrian went to school somewhere and graduated with some degree. His poor headshot doesn’t speak to his competency, or maybe it does. Adrian loves his dog and has some kids and a wife but really loves his dog. Shout out to Quinn!

Nancy Bertand

Managing Director Canada -Market Executive

Citi Private Bank, Canada



Nancy Hoi Bertrand is Managing Director and Head of Citi Private Bank, Canada. In this role, she is responsible for the growth of the business in Canada, which serves and advises ultra-high net worth families, foundations and single-family offices on wealth preservation and creation, with a particular focus on alternative and international investments.

Citi Private Bank is dedicated to serving the world’s wealthiest individuals and their families. From 60 locations across 20 countries, the Private Bank offers services to more than 14,000 ultra-high net worth clients from nearly 100 nations. Its Canadian offices are in Toronto, Montreal and Vancouver. Having originally joined Citi Private Bank in 2006, Nancy has over 25 years of capital markets experience. Prior to Citi, she practiced U.S. securities law at the global law firm AOShearman, specializing in cross-border corporate finance and mergers and acquisitions.

Nancy sits on the board of the Golf Association of Ontario and is Past-President of the Toronto CFA Society and former Chair of its Governance and Nominations Committee. She was a member of the CFA Institute’s Capital Markets Policy Committee and a member of CFA Institute’s Global Corporate Governance Task Force and received her Chartered Financial Analyst designation in 2002.

Nancy is a graduate in Business Administration (Dean’s List) from the Richard Ivey School of Business at Western University and a Bachelor of Laws (great distinction) from McGill University. She has been called to the bars of the State of New York, the Commonwealth of Massachusetts and the Province of Ontario. She previously sat on the cabinet of the Royal Ontario Museum’s Young Patrons’ Circle, speaks Mandarin, Cantonese and French, is married and mentoring an adult daughter.



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SPEAKER BIOGRAPHIES

Jamie Biddle

Founding Partner and Chief Executive Officer
Verdis Investment Management



Jamie Biddle is the founding partner and CEO of Verdis Investment Management. He sets the strategic direction of the family office and oversees investment activities, operations and finance. Jamie is behind portfolio construction, manager sourcing and selection, due diligence and risk management. Jamie is an active member of the Investment Committee.

Jamie brings more than two decades of investing and operating experience, across asset classes and industries. Prior to forming Verdis Investment Management in 2004, Jamie was President and CEO of Orcom Solutions. Orcom was an outsourced customer care and billing service for electric, gas and water utilities across North America. The company was originally purchased by a group of private equity firms (including the Blackstone Group and Thomas H. Lee Partners) led by Jamie and was sold to Alliance Data Systems (NYSE:ADS) in December 2003. Jamie began his career as a VC at EnerTech Capital Partners, funding technologies in energy and power.

He earned his Masters in Business Administration from the Wharton School of the University of Pennsylvania and a bachelor's degree from the University of Pennsylvania. Jamie is the President of Andalusia Foundation.

Stephen Bloom

Founder
Batl Capital LP



A former senior partner of Goodmans LLP, one of Canada's leading full service law firms who practiced corporate law for almost 30 years. Past CEO of Shiplake Properties Ltd., a third-generation family-owned private business. Co-founded Collecdev, Shiplake's development and construction management business. Currently, President and Managing Partner of Batl Capital, founded by Stephen as a family office and manager of capital.

In his previous role as CEO of Shiplake, Stephen provided critical support and guidance to the day-to-day management of a billion-dollar business that included the ownership and operation of an apartment portfolio and retirement residence, high-rise development and construction management, as well as investment in commercial real estate, private equity and public securities.

Stephen is a value-added investor who has negotiated and completed dozens of transactions, including land and business acquisitions, dispositions, financings, joint ventures, partnerships and shareholder agreements, while providing wise counsel throughout the life cycle of the investment.

Stephen has served on the boards of various charitable organizations including the Israel Cancer Research Fund, Tanenbaum CHAT and Trustees of the Jewish Foundation of Toronto.



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SPEAKER BIOGRAPHIES

Félix Boyer

KPMG Canada

Executive Director, Wealth & Investment Strategy



Félix Boyer oversees the delivery of KPMG Family Office's National Wealth and Investment Strategy engagements. KPMG Family Office is an independent, open architecture and institutional investment platform tailored to support families and private foundations with a wide-ranging suite of tailor-made investment solutions. It adopts a multi-disciplinary, independent and customized approach to family investment solutions. Félix leads projects that encompass portfolio reviews, investment approach structuring, asset allocation, manager selection and ongoing investment monitoring.

Prior to his current role, Félix held various positions, including roles in asset management front office, serving as an institutional investment principal, and as a leading consultant in sustainable investment. Throughout his career, Félix has consistently designed and implemented bespoke solutions for his high AUM clients, including family offices, ultra-high-net-worth (UHNW) families, pension plans, foundations/endowments, banks, insurers and other institutions.

Félix is well-versed in all asset classes and is particularly recognized for his deep expertise in manager selection and private markets. He excels at creating personalized solutions in strategic investment structuring, ESG assessment, investment policy statements, asset allocation (both long-term and tactical), manager selection, impact investing, and performance/risk/ESG monitoring, all through a client-centric approach. He understands each client's unique situation and objectives while leveraging his extensive investment industry knowledge to serve them effectively.



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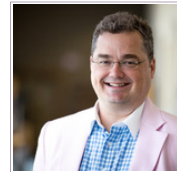
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SPEAKER BIOGRAPHIES

James Burron

Founding Partner
CAASA



James co-founded CAASA in response to industry support for a Canadian alternatives association to serve all aspects including: hedge / alternative strategies; liquid alternatives; private lending; private real estate; private equity; plus emerging areas where Canada is a leader such as digital assets / blockchain and robo-advisors.

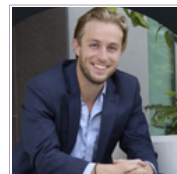
Prior to CAASA, James was the Chief Operating Officer of AIMA Canada where his team of three worked with 12 committees to produce 50-60 events per annum across Canada, organized 100+ committee meetings, and increase member numbers over his 7-year tenure from 66 to 164 corporate entities.

James currently sits on the Canadian Investment Funds Standards Committee (CIFSC), which categorizes mutual funds and alternative mutual funds (aka liquid alternatives) for the retail space in Canada. He is also called upon by membership and industry groups to speak to risk ratings and portfolio placement of all types of alternative investments.

James also has experience in research and writing for the CAIA Association (holding the designation since 2006) as well as serving on CAIA's exam council and as a well as other duties. He had roles in institutional sales and FoHF structuring in Seoul, South Korea, as a Product Manager at ICICI Wealth Management, and as an Investment Advisor at RBC Dominion Securities. James graduated from Simon Fraser University with a BBA (Finance).

Drew Colaiezzi

Private Investments
McPike Global Family Office



Drew Colaiezzi is a private equity/venture capital specialist & investment manager with a background in capital markets focused on securitizations, specialty credit products, fixed income asset-back warehouses, financing consultancy, investment strategies & management, investment relationship structures, and early-stage venture.

After working in NYC and Miami for various private equity firms, he moved internationally and currently sits on the investment committee for MGFO, a single-family office based out of the Bahamas with a large venture portfolio containing exposure to various industries with a strong focus on early stage opportunities in financials, tech, fintech, life sciences, the carbon economy, venture funds, co investment opportunities, and web3/crypto based assets.



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* Management's assessment, based upon loss history and loan to value ratio.

SPEAKER BIOGRAPHIES

Russell Deakin

CIO and Managing Partner
Aceana Group



Russell Deakin serves as the Chief Investment Officer (CIO) and Managing Partner at Aceana Group, bringing over 25 years of experience in alternative assets, including private equity, venture capital, real estate, infrastructure, and renewable energy. His career spans North America, Europe, South America, India, and China, underscoring his extensive global expertise.

His specialties encompass entrepreneurial ventures, blockchain, crypto, growth capital, private equity, real estate development, infrastructure, renewable energy, and international capital markets.

Russell holds an MBA from the Anderson Graduate School of Management at UCLA, with undergraduate studies completed at Oxford University (Honors Exchange Program in PPE) and Tufts University (BA in Economics and History).

Sean Driscoll

Director & Co-Chief Executive Officer
FAX Capital



Sean Driscoll is the Co-Founder, Co-Chief Executive Officer and Director of FAX Capital, an investment company focused on high quality investment opportunities in equity, credit and real estate across both public and private markets. He is also the Co-Chief Executive Officer and Director of Federated Capital, a single-family office.

Before establishing FAX, Mr. Driscoll spent 10 years at Sentry Investments, a Canadian mutual fund company, where he was the Chief Executive Officer and a member of the board of directors and led a multi-year strategic repositioning of the company as it grew organically from \$3 billion to \$20 billion in assets under management becoming one of Canada's largest independent asset management firms. Sentry was acquired in late 2017, laying the foundation for the capitalization of FAX and Federated. Mr. Driscoll was also President and CEO of NCE Diversified Management, a company that raised over \$350 million across 5 partnerships during his tenure, for investment in resource exploration and development companies on a tax advantaged basis. Prior to joining Sentry, Mr. Driscoll worked at a leading Canadian investment bank where he worked on a broad range of financing transactions and merger and acquisition assignments.

Mr. Driscoll currently serves as a director of the UHN Foundation where he is a member of the Finance and Investment Committees. He holds a Masters of Business Administration from the Schulich School of Business, York University and received a Bachelor of Arts degree (Economics) from McGill University. He is a graduate of the Directors Education Program, jointly developed by the Institute of Corporate Directors and the University of Toronto's Rotman School of Management and has obtained the ICD.D designation.



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SPEAKER BIOGRAPHIES

Andrew Garrett

Chief Investment Officer
Spotlight Development



After more than 20 years in institutional investing—as both a pension-backed GP and LP—Andrew Garrett brings a fresh perspective to family office investing in his dual roles as Chief Investment Officer at Spotlight Development and Board Advisor at Ruck Lane.

Andrew leads Spotlight’s investment strategy and capital partnerships, drawing on his extensive experience in commercial real estate across Canada, the U.S., and Mexico. Over the course of his career, he has managed more than \$8 billion in new-build developments and held leadership roles at Cadillac Fairview and IMCO, where he cultivated deep industry relationships and consistently delivered high-performing projects.

A committed community advocate, Andrew served on Ontario’s Housing Affordability Task Force and continues to champion projects that align financial performance with social impact.

He holds an MBA from the Kellogg School of Management, a Bachelor of Commerce from the University of Guelph, a certificate in Crown Corporation Board Director Effectiveness from the ICD, and advanced training in Real Estate Development from MIT.

Andrew Hamlin

Vice President and Portfolio Manager
Federated Capital



Andrew leads the investment team at Federated Capital, a private single family office. He is responsible for overseeing the whole investment process from identifying, investing, and monitoring investments. He has extensive experience allocating capital in both public and private markets. Andrew has a strong track record of performance having worked in the industry for over 25 years. Previous experience includes spending 10 years building an independent asset manager, working with high net worth families, and sitting on the board of a private air logistic company. He started his career in the capital markets division of Canada’s largest banks. Andrew has an MBA from the Schulich School of Business and a Master degree in International Politics from Sussex University (UK).

Tec Han



Tec Han, MBA is a senior investment allocator with over 20 years of experience in asset allocation, manager research, and portfolio strategy. Tec was the founding Chief Investment Officer of Vibrato Capital, a Portland-based family office, and has held investment roles at Clark Enterprises and the National Railroad Retirement Investment Trust. He serves on the board of CareOregon, guiding strategic financial sustainability for Oregon’s largest Medicaid and Medicare provider.

SPEAKER BIOGRAPHIES

Geraldine Hardy

Family Hippocampus



Geraldine is a Director and coach of Family Hippocampus, a peer -to-peer driven Think & Do Tank focusing on family dynamics in business families. She was born in Indonesia to a Chinese father, to an 8th-generation Peranakan business family and descendant of Hong Kiam Lauw, and a German mother. She grew up across Indonesia, Germany, and the United States, gaining valuable experience in connecting with stakeholders from diverse cultural backgrounds.

With over 27 years of professional experience in marketing, business development, and communications, Geraldine has a strong background in investor relations and stakeholder engagement across private and public equity.

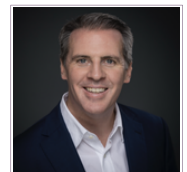
Geraldine has worked and lived in nine countries in various industries that involved adapting and gaining knowledge in sectors such as oil & gas, bio pharmaceutical, clean tech, information technology, luxury: yachting, private aviation property, family office and finance in Europe (Germany, Portugal & France), UK (London & Brighton), ME (Dubai), Africa (Tanzania & Cameroun), SEA (Singapore & Indonesia), Australia (Brisbane) and USA (New York).

She blends business acumen with a focus on well-being to enhance productivity, creativity, and integrity in my decision-making process—qualities I see as essential for adapting to today's uncertain landscape.

Trauma & Energy Coach, Shaolin Temple Europe Taiji Martial Artist, Alchemy Healer, NLP Master Coach and Meditation Guide.

John Hynes

Chief Executive Officer
HedgeFacts



John Hynes is the Chief Executive Officer at HedgeFacts, a leading provider of cloud hosted middle & back office outsourced solutions to Family Offices, Allocators and Investment Managers.

HedgeFacts is a family owned business which has provided John with experiences and insight which enables his to relate to many clients.

John previously held various at Barcalys Bank and Allied Irish Banks after starting his career with PwC. John is a graduate of Trinity College Dublin and is a Fellow of the Chartered Accountants in Ireland.

SPEAKER BIOGRAPHIES

Loïc Julé

*Head of Public Markets, Absolute Return and Direct
Investment Transactions*
Richter



With over 25 years of experience in financial markets, Loïc is known for his strategic thinking, innovative mindset, and ability to bring clarity to complexity. His approach is grounded in a strong institutional foundation and a commitment to delivering thoughtful, high-quality investment solutions. Across his career, he has earned the trust of partners and peers alike by building long-term relationships and consistently aligning investment decisions with each client's broader vision and values.

At Richter, Loïc oversees public markets, absolute return strategies, and direct investment transactions. Drawing on his extensive institutional background, he takes a comprehensive view of each mandate—working closely with internal teams and business owners to evaluate opportunities, construct portfolios, and deliver meaningful results.

Loïc is valued for his open-mindedness and team-first mindset. He believes the best ideas emerge through collaboration and brings a balanced, people-focused approach to every conversation. Clients and colleagues appreciate his ability to listen deeply, think creatively, and stay focused on what matters most—navigating investments with confidence and clarity.

Rohit Khuller

Vice President – Investment Management
LetkoBrosseau



Rohit Khuller is a McGill University graduate (MBA) with a bachelor's in engineering from Delhi College (B. Eng). A CFA® charter holder, he has also completed the Harvard Business School General Management Program (GMP).

Prior to joining Letko Brosseau in 1998, he held a senior sales engineering position at Carrier Airon Ltd, after completing internships with major companies such as Suzuki India, Indian Airlines and Bank of America.

Mr. Khuller's career in various industries such as automotive, aerospace and banking in several countries has enabled him to deepen his knowledge in different fields. After 25 years with Letko Brosseau, in addition to his role as Portfolio Manager, he is now Vice President, Investment Management and member of the Investment Council, overseeing portfolio strategy and risk management for all the company's assets, and is responsible for the firm's emerging markets equity investments.

Mr. Khuller is recognized for his talent as an investor, his strong analytical skills, and his diligence in his work.

SPEAKER BIOGRAPHIES

Scott Morrison

Chief Investment Officer

Wealhouse Capital Management



Scott Morrison is the Chief Investment Officer of Wealhouse Capital Management, a privately-owned investment firm and family office. As the firm's founder, Scott is responsible for overseeing Wealhouse's various strategies across asset classes, as well as the firm's private equity portfolio and real estate holdings.

Outside of Wealhouse, Scott serves on the investment committee of the Centre for International Governance Innovation (CIGI), where he advises on investment decisions for CIGI's endowment fund. Scott has over 25 years of asset management experience. Prior to Wealhouse, Scott spearheaded the portfolio management for notable firms such as Mackenzie Investments, CI Funds, and Investors Group. Scott holds a Bachelor of Finance from Concordia University and is a CFA Charterholder.

Jeff Noble

Director, Private Wealth Family Office

BDO Canada LLP



Jeff is a senior consultant in the BDO Wealth Advisory & Tax Services Practice. With 25+ years of family facilitation and financial experience, Jeff helps family enterprises, private companies and not-for-profits effectively deal with the transition from one stage of their lifecycle to the next. The fourth generation to spend several years working in his family's firm, Jeff thoroughly understands the challenges facing privately-owned businesses, their key stakeholders and the high net worth families they support.

For over two decades, Jeff continues to grow and apply his knowledge and experience to help private company owners and their families adapt a truly holistic approach to planning for the future. He is renowned for expertise in strategic wealth preservation, stewardship & growth, family enterprise risk management, succession & family wealth continuity planning, wealth transition and family governance. In 2003, he earned the Certified Management Consultant designation, globally-recognized as the highest standard of consulting and adherence to a code of professional conduct. More recently, Jeff earned the designation of FAMILY ENTERPRISE ADVISORTM representing the pinnacle of professional expertise in the field of family enterprise advising.

SPEAKER BIOGRAPHIES

Greg Nott

SVP, Chief Investment Officer
Northwood Family Office

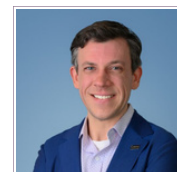


As a member of the firm's management team, Greg leads Northwood's investment activities, and provides overall thought leadership on all investment matters for the firm. Working in conjunction with other members of the investment team, Greg draws on his extensive experience in asset allocation and conducting due diligence on investment managers, with an aim to select and monitor best-in-class investment managers across all asset classes. Greg also participates in building client relationships and business development. Prior to joining Northwood, he was a member of Russell Investments Canada's Leadership Team, and regularly met with the firm's institutional and individual clients to discuss investment strategies and outlook. He was responsible for management of the firm's Canadian fixed income and multi-asset portfolios, while also overseeing the Canadian investment team.

Greg attained his Chartered Financial Analyst (CFA) designation in 1999. He has a Bachelor of Commerce degree from Queen's University. Greg is an active member of his community, volunteering his time to support a number of his children's activities.

Steven Novakovic

Managing Director, Educational Programs
CAIA Association



Steve Novakovic, CAIA, CFA is the Managing Director, CAIA Curriculum for CAIA Association. In this role, he is responsible for managing the CAIA Charter curriculum, ensuring the content remains relevant and reflects current trends in the institutional asset allocator space. He joined CAIA Association in 2022 and has been a Charterholder since 2011. Prior to CAIA Association, Steve was a faculty member at Ithaca College in Ithaca, NY, where he taught a variety of finance courses including: Cryptocurrencies, Alternative Asset Management, and Wealth Management, among others. Before entering academia, he worked at his alma mater, Cornell University, (B.S. 2004, MPS 2006) in the Office of University Investments. In his time at Cornell University, Steve invested across a variety of asset classes for the \$6 billion endowment. His twelve years at Cornell generated substantial insight into endowment management and fund investing across the alternatives and traditional landscape.

SPEAKER BIOGRAPHIES

Robert S. Reichmann

President

Reichmann Rothschild



Robert S. Reichmann is the President of ReRo, a third-generation family office and investment firm focused on North American real estate and private opportunities. He is particularly passionate about purpose and spirituality.

François Ritchot

Investment Director

Sagana



François is an impact investing transaction and strategy professional. He is an Investment Director at Sagana, advising UNWHI and family offices investing in companies and funds with attractive financial returns and significant human and planetary impact. At Sagana, François leads investment activities in the Food and Agriculture sector globally. He was previously an Associate Director at Palladium Impact Capital (formerly Enclude) where he provided capital raising services to impact enterprises (pre-revenue to growth-stage) and mission-driven financial institutions as well as impact fund placement.

Jay Rosenfeld

Director of Business Development

Peerage Capital & Artemis



Jay is Peerage Capital & Artemis' Director of Business Development. Jay brings more than 30 years of experience in the Financial, Advertising and Marketing industries. Responsible for building business for the groups, Jay has exposure to all asset classes and a deep understanding of Asset Allocation & Asset management.

Prior to Artemis, he worked as Regional Director for Smart Circle International overseeing operations in the North Eastern United States. He hired, trained, and managed over 200 sales representatives. Jay earned a Bachelor of Arts and an Economics degree from Bishop's University.

SPEAKER BIOGRAPHIES

Nima Sanajian

Managing Director of Investments
Wealthsimple



Nima Sanajian is the Managing Director of Investments at Wealthsimple, with over 15 years of experience in investment management. He leads the firm's alternative investment offerings, asset allocation, and portfolio construction strategies. Prior to Wealthsimple, Nima spent nearly seven years at CPP Investments, where he specialized in strategic asset allocation, portfolio construction, and the development and management of systematic macro strategies. Earlier, he served as a senior quantitative analyst at RBC. Nima holds a Ph.D. in Operations Research from the Rotman School of Management (University of Toronto).

Shael Soberano

Chief Investment Officer
Sharno Group Inc.



Shael Soberano, CFA, is the Chief Investment Officer of Sharno Group, a privately owned independent principal investment group and family office focused on identifying strategic, value-add investment opportunities across a wide range of traditional and alternative asset classes and strategies.

Shael is also the President & CEO, Portfolio Manager & Chief Compliance Officer of Sharno Capital Corporation, a registered Exempt Market Dealer and Portfolio Manager with the Ontario Securities Commission, and distributes securities in Ontario to eligible Accredited Investors.

Prior to Sharno Group, Shael Soberano was Vice President, Senior Analyst at Vision Capital Corporation, a leading Toronto-based Hedge Fund manager focused on publicly traded real estate related securities. Shael first joined Vision Capital as an Analyst in 2009, shortly after its inception. He was promoted to Vice President, Senior Analyst in 2014, and was registered as an Advising Representative with the Ontario Securities Commission in 2017. With a wide range of roles spanning both business development and investment management initiatives, Shael's contributions were integral in growing Vision Capital's assets under management and contributed to its award-winning risk-adjusted performance over that period.

Shael is a CFA Charterholder and completed the Bachelor of Management and Organizational Studies Honours Degree with a Specialization in Finance at the University of Western Ontario. Shael completed the Partners, Directors, and Senior Officers (PDO) Course in 2019 and the Canadian Securities Course (CSC) in 2010, provided by the Canadian Securities Institute (CSI).

SPEAKER BIOGRAPHIES

Pascal St-Jean

President & CEO
3iQ



Throughout his career, Pascal has focused on the transformation and disruption of industries via rapid scaling of businesses under his leadership. Having successfully created and grown multiple business ventures, Pascal was recognized as one of the youngest recipients of the Forty Under 40 award.

Before joining 3iQ, Pascal was an active angel investor and served as Strategic Advisor and Fractional Executive to over 5% of the Globe and Mail's 500 fastest growing companies in Canada.

Pascal's experience in open-source technologies and distributed systems led him to invest in cryptocurrency in 2016, and act as an educational resource on digital asset investments to several organizations. As President & CEO of 3iQ, Pascal is focused on overseeing the growth and global expansion of the company as it continued to pave the way as a global leader in Digital Asset Management.

Jason Taylor

Founder & CEO
Climate Finance Advisors



Jason Taylor is a capital markets professional with over 20 years of experience and founder of Climate Finance Advisors a boutique sustainable investing firm. In recent years he led the teams and development of the sustainable finance strategy for two Canadian banks working in close collaboration with groups across the bank and capital markets. A frequent conference panelist and speaker covering a wide range of sustainable finance topics (impact investing, transition & environmental finance), Jason has also participated in a number industry workstreams to accelerate the mainstreaming of sustainable finance.

He is an advocate for using the power of capital to influence systemic change and contribute to building just, faire, and resilient communities. His work focuses on crowding-in capital to shrink various funding gaps (nature, climate, transition, social) in a financially efficient manner. He completed an MBA focused in sustainability, strategy, and innovation management at McGill/HEC Montreal, where he was named to the Poets & Quants 2019 100 best & Brightest list. He co-instructs the sustainable investing course in Concordia University's MBA program and is a CFA and CAIA charter holder. His volunteering commitments are focused on his role on the board and investment & Impact committee of the Foundation of Greater Montreal, and as president of West Island Lacrosse.

SPEAKER BIOGRAPHIES

Lois Tullo

Executive in Residence

The Global Risk Institute



Lois Tullo is an expert in the area of risk, technology, finance, compliance and corporate governance. She has over 30 years of business experience spanning financial services, technology, cryptocurrency, telecommunications, strategy consulting, raising venture capital, M&A, and natural resources. In 2024 she was awarded Top 10 Women CFOs in Canada. She is a UN CEFACT Expert, and Global Blockchain Business Council Ambassador.

As CFRO/CCO she is responsible for financial oversight for KuberMIC a Mortgage Investment Corporation and Advisor for YAMS LLP a Crypto system company. She has over 20 years of Board experience as Chair, Treasurer, and Risk and HR Committee Chair, for a tier 1 bank, private sector and not-for-profit organizations. As an Executive-in-Residence for the Global Risk Institute she spoken on and published the Global Risks and Trends Framework (GRAFT), the linkage of risk management and business strategy, Polycrisis, and the Future of Digital Assets. She has publications for the Banking, Government, and Pension/Asset Management sectors. She is an conference speaker at the United Nations, IACPM, Risk.net, etc, author, and faculty of risk mgt; cyber security, data and IT risk; and financial services at the Schulich School of Business, York University. She teaches in the Master of Risk Management Certificate program, executive programs, MBA, and undergraduate program. She is the author of the whitepaper Enterprise Risk Management – Canadian Best Practices, and Nonfinancial Risk Best Practices in Canada.

She was previously CFO for CIBC Finance Inc. where she was responsible for a \$6 Billion credit portfolio, Human Resources, and \$1.5 securitization. She held senior positions with a large telecommunication company in the area of Finance, HR, and Business Process Redesign. She provided strategy and technology advice for a Boston consulting firm in the financial, oil and gas mining, and government sectors. She has done international relief and development work in Ethiopia. She was in data management for a gas transmission company. Previously she was a C.P.A./C.A. with Clarkson Gordon/E&Y, and PWC. Ms. Tullo is a CPA, CA, ICD.D, CCO. She has a Bachelor of Commerce from the University of Saskatchewan, and an EMBA from the Ivy School of Business, University of Western.

SPEAKER BIOGRAPHIES

Greg Valliere

Chief U.S. Policy Strategist
AGF Investments



Greg Valliere joined AGF Investments (AGF) in February 2019 as Chief U.S. Policy Strategist. In this role, he is responsible for providing insight into how U.S. politics are shaping global markets.

He brings a unique perspective to AGF with more than four decades of experience analyzing policy and politics providing regular commentary and insight into Washington for financial services and investment management clients globally, including specialized coverage of the Federal Reserve, economic policy and politics. Greg began partnering with AGF in 2017 advising investment management teams on policy and the impact on global markets, providing daily market commentary for financial advisors and participating in numerous client events and roadshows.

Greg has more than 40 years of experience following Washington issues for institutional and retail investors. He is widely quoted in U.S. media and specializes in coverage of the Federal Reserve, tax and spending issues, and politics. Greg is based in Washington, D.C.

Adam Vigna

Managing Partner and Chief Investment Officer
Sagard Holdings



Adam Vigna has served as Managing Partner and Chief Investment Officer of Sagard since 2016. As the firm's Chief Investment Officer, Adam is actively involved in all investment decisions made across the platform and is responsible for Sagard's overall investment activities, including investment strategy, governance, and portfolio construction. Adam also serves as Chief Investment Officer of Sagard Credit Partners. Adam is a member of the Management Committee and is currently a director of Peak Achievement Athletics. He is based in Toronto, Canada.

Prior to Sagard, Adam spent nearly a decade at the Canada Pension Plan Investment Board ("CPPIB") where he was Managing Director and Global Head of CPPIB's Principal Credit Investments Group ("PCI") with approximately CA\$20B of AUM. While at CPPIB, Adam was one of the founding members of CPPIB's Principal Credit Investment Group and led CPPIB's acquisition of Antares Capital in 2015. Prior to CPPIB, Adam was Vice-President at Goldman Sachs in the Special Situations Group ("SSG") in New York, US and Toronto, Canada. In 2006, he moved to Toronto from New York to become one of the three founding members of the Canadian Special Situations Group ("CSSG"). Before joining SSG, Adam worked in Goldman's Investment Banking Division in New York where he was a part of their Financial Institutions Group ("FIG").

Adam holds a B.Comm. (Honours) degree from Queen's University in Kingston, Ontario. He served on the boards of Antares Holding (Chair), Antares Capital, Teine Energy, Laricina Energy, and Long Point Energy.

SPEAKER BIOGRAPHIES

Robert Wilson

Senior Vice President, Head of Portfolio Construction Consultation Service
Picton Mahoney Asset Management



Robert Wilson, Senior Vice President, is the Head of Picton Mahoney's Portfolio Construction Consultation Service (PCCS). He is responsible for leading a multi-disciplinary team of experts in asset allocation, risk management, quantitative research and portfolio management. Robert and his team partner with investment advisors and institutional investors to help them construct more resilient and efficient investment portfolios. Robert is often invited to share his insights on alternative investments, asset allocation and portfolio construction with industry groups and media outlets.

Prior to joining Picton Mahoney in 2019, Robert spent 10 years working in financial services in progressively senior roles. Most recently, Robert was vice president at BlackRock Asset Management Canada Limited where he distributed iShares ETFs to Canadian investment advisors. Prior to that, Robert was an associate at PIMCO where he distributed PIMCO funds to Canadian investment advisors.

Robert holds an MBA from the Rotman School of Management at the University of Toronto. He is a CFA charterholder, and he holds the Chartered Alternative Investment Analyst designation. He is also a member of the Responsible Investment Association of Canada and holds the Responsible Investment Professional Certification designation.

Edwin Wong

VP Investments
Chandaria Family Holdings, Inc



Edwin is the VP Investments at Chandaria Family Holdings, Inc, a single-family office in Toronto, Ontario where he leads and is responsible for all aspects of portfolio management and oversight.

Edwin has extensive experience building and managing multi-asset portfolios for institutional and private clients, creating processes and frameworks for enhanced investment governance, and conducting thoughtful due diligence, selection, and oversight of investment managers and strategies.

Edwin holds the CFA and CAIA charters and the CFP and FRM certifications/designations.

The image shows a dark purple header bar at the top with the word "NOTES" in a bold, white, sans-serif font. Below the header, the page has a light gray background with horizontal lines. The lines are evenly spaced and extend across the width of the page, providing a structured area for writing notes.

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For more information on CAASA membership, initiatives, and events please contact:

James Burron, CAIA
Founding Partner

Paul Koonar, CFA
Partner

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