Strategy Institute presents...

16th Annual

Foundation, Endowment & Not For Profit INVESTMENT Summit

January 30 - 31, 2019 | Hyatt King, Toronto, ON

New investment strategies from:

The London Community Foundation

The Leona M. and Harry B. Helmsley Charitable Trust

Holland Bloorview Kids Rehabilitation Hospital

Fondation Sierra Club Canada Foundation

Médecins Sans Frontières / Doctors Without Borders

Increase returns, harness new investment strategies and meet your mandate in this changing market!

Meet + Network + Learn From:

David O'Leary,
Director of Impact Investing,
World Vision Canada

Sandra Hawken,
President and CEO,
Holland Bloorview Kids Rehabilitation Hospital Foundation

Joshua Fenton,
Director of Investments,
Helmsley Charitable Trust

Avery Shenfeld,
Managing Director and Chief Economist, CIBC Capital Markets,
CIBC World Markets Inc.

Julia Langer,
CEO,
The Atmospheric Fund

Simba Ndemera,
Chief Financial Officer,
Sierra Club Foundation (U.S.)

Take Away Key Strategies To:

- Overcome Economic Uncertainties
- Manage Late Cycle Risks
- Tap into Cryptocurrencies
- Bolster Impact Investing Strategies
- Leverage Blended Finance
- Conduct Effective Manager Searches
- Utilize High Yield Bonds

Gold Sponsors:

Connor, Clark & Lunn Financial Group
Russell Investments
Jarislowsky Fraser Global Investment Management
HSBC Global Asset Management
World Gold Council

Silver Sponsors:

Horizons ETFs
Manulife Asset Management

Cocktail Sponsor:

Cidel Asset Management

Wifi Sponsor:

Silver Heights Capital Management

FoundationEndowment.ca

16th Annual

Foundation, Endowment & Not For Profit INVESTMENT Summit

Welcome to Canada's longest-running and largest investment summit dedicated to foundations and endowments.

With heightened volatility expected in the market, it is your duty to re-evaluate and adapt your investment practices to increase returns and achieve your mission.

Blended finance, cryptocurrency tokens and high yield bonds are all increasing in popularity as effective investment strategies. Join this gathering of the top chief investment officers in North America to increase your returns and build your assets.

This event will provide you with proven insights on mitigating market volatility, tapping into promising alternative markets and increasing your investments' impact. Stay on top of the latest industry and investment trends and further your objectives.

We look forward to you joining your industry peers at this annual marquee event!

Your Foundation, Endowment and NFP Investment Team
Strategy Institute

Acquire Critical Insight From Foundation Leaders:

- Fondation Sierra Club Canada Foundation
- Holland Bloorview Kids Rehabilitation Hospital Foundation
- The Leona M. and Harry B. Helmsley Charitable Trust
- CIBC World Markets
- TAF The Atmospheric Fund
- Imagine Canada
- The London Community Foundation
- Share Shareholder Association for Research & Education
- Inspirit Foundation
- Médecins Sans Frontières Doctors Without Borders
- Université de Sherbrooke
- MaRS CatalystFund

Event In Numbers

9 Case studies

10+ Networking hours

11+ Foundations

2 Keynotes

New This Year

- Anticipate the impact of higher interest rate environment on your portfolio
- Understand how cryptocurrencies are a viable asset class for endowments & foundations
- Use security tokens in investment strategy
- Blended finance as a new approach to investment
- Manage late cycle risk
- Take advantage of illiquidity premium of alternative investments
- Clarify the role of high yield bonds in your portfolio

Register online at **FoundationEndowment.ca**

Gain exclusive insights and knowledge on:

1. **Economic Landscape:** Adapt to changing monetary policies
2. **Accessing Cryptocurrency Market:** Using security tokens
3. **Blended Finance:** Balance purpose and profit effectively
4. **Social Investment:** Align investment and your mission
5. **Risk Management:** Mitigate late cycle risks
6. **Investment Manager Searches:** Improve manager selection to enhance portfolio performance
7. **Fixed Income:** Incorporate high yield bonds into your portfolio
8. **Alternative Assets:** Take advantage of the illiquidity premium
9. **Responsive Investing:** Ensure you generate higher returns
10. **Active Ownership:** Discover how to actively engage with your investments

Register Today!

Get all the updates you need on foundation, endowment and NFP investments

Save your spot now for Canada's longest-running and largest investments summit dedicated to foundations and endowments

1-866-298-9343 x200

registrations@strategyinstitute.com

FoundationEndowment.ca

Start The Conversation Before The Summit!

Get your opinions heard.
Follow us on Twitter **@FENISummitCA** and using **#FENITO19**

Join the debate with innovators and peer executives in **Foundation, Endowment & Not for Profit Investment Strategies.**

Some of the Past attendees

Inspirit Foundation // Heart & Stroke Foundation // Laidlaw Foundation // The Princess Margaret Cancer Foundation // Canadian Red Cross // The J.W. McConnell Family Foundation // Alberta Real Estate Foundation // BC Cancer Foundation // Central City Foundation // Covenant House Vancouver // Emily Carr University // Imagine One Day Foundation // Lutheran Foundation Canada // Peace Arch Hospital Foundation // Simon Fraser University // St. Andrew's Wesley United Church // The Victoria Foundation // Thompson Rivers University // University of Saskatchewan // University of Victoria // Vancity Community Foundation // VGH & UBC Hospital Foundation // WWF-Canada

Who You Will Meet

Foundations, Endowments & Not-for-profits

Chief Investment Officer // CEO & President // Executive Director // VP & Director, Finance// Investment // CFO // Investment Committees' Board of Directors // Trustees // Treasurer

- *Protect your assets and increase your capital*
- *Balance investment and disbursement rates to deliver on mission*
- *Contribute to your mandate with responsible investing*

Asset Managers and Money Managers

Chief Investment Officer // Managing Director // Principal VP & Director, Strategy // VP, Product Development // VP, Sales/Marketing // VP, Business Development // Portfolio Manager

- *Connect with CIOs and F&E decision-makers*
- *Forge new relationships and become a preferred provider*
- *Contribute to industry advancements and build industry growth*

Consultants

Managing Director // Principal // Partner // VP & Director, Strategy

- *Stay up to date with F&E's top executives' concerns*
- *Network with existing and prospective clients*
- *Be the go-to solution provider for legal and governance challenges*

Register today by calling **1-866-298-9343 x200**

DAY ONE Wednesday, January 30, 2019

7:30 AM Registration and Breakfast

8:15 AM Opening Comments from the Chair

8:30 AM KEYNOTE: ECONOMIC CLIMATE

Global and North American Outlook and the Implications for Investors: A Look Ahead Through 2020

How will the global and North American economic backdrop impact financial markets in the years ahead? Get the latest economic outlook to overcome market volatility for your organization. Source intelligence to:

- Assess whether global growth is set to slow
- Determine which way ahead for central banks
- Anticipate how commodities, bond markets, equities and currencies will respond

Steering your portfolio through the next phase of the cycle

Avery Shenfeld,
Managing Director and Chief Economist, CIBC Capital Markets,
CIBC World Markets Inc.

9:15 AM CASE STUDY: MANAGING LATE CYCLE RISK

How to Manage the Final Stages of a Bull Market and Increase Your Returns

The final stages of a bull market are often surprisingly profitable. Managing this high return vs. high risk reality heightens the importance of accurately managing investments late in the market cycle. Discover how to give up some upside in the late stages of a market cycle by moving to cash/bonds to protect your asset base. Take away a plan to:

- Develop an investment program from zero
- Manage against two separate investment objectives
- Adjust investment goals: allowing for some market underperformance for long term benefit

Joshua Fenton,
Director of Investments,
Helmsley Charitable Trust

9:45 AM INDUSTRY EXPERT: COMMITTEE DECISION-MAKING

Positively Impact your Committee Decision-Making

Investment committees are typically comprised of volunteers with significant investment experience. To make effective decisions, it's critical to be aware of biases and influences that can negatively impact decisions. Take back to your office strategies to:

- Create awareness of the major biases and influencers
- Provide insights on how to improving decision-making dynamics for positive outcomes
- Get the most out of your investment committee

Enhance committee decision making through best practices

Peter Muldowney,
Senior Vice President, Institutional Strategy,
Connor, Clark & Lunn Financial

10:15 AM Morning Networking Break

10:45 AM INDUSTRY EXPERT: WORLD GOLD COUNCIL

Enhancing Portfolio Performance with Gold

Matthew F. Mark,
Director, Asset Owners/Distribution,
World Gold Council

11:15 AM INDUSTRY EXPERT: HSBC

Staying at the Forefront of Climate Change

Exploring how institutional investors can stay at the forefront of climate change and how to achieve enhanced equity returns through a clear investment rationale while integrating ESG factors.

Sandra Carlisle,
Senior Responsible Investment Specialist,
HSBC Global Asset Management

11:45 AM CASE STUDY: THE ILLIQUIDITY PREMIUM

How to Increase Your Returns by Harnessing the Illiquidity Premium

The concept of buying illiquid assets as a long-term investment for endowments has been popularized by David Swensen, CIO of the Yale Endowment fund. Achieve excess returns for your organization by investing in illiquid investments like real estate, private equity/venture capital, and even timber. This session will explore

- Using private debt to provide excess returns over traditional bonds
- How adding alternatives can reduce risk due to lower correlation and increase returns
- Strategies for using income provided for endowment, while principal increases over time

Understand how the Illiquidity Premium works to increase your returns.

Nick Bakish,
President,
Sierra Club Canada

Follow us on Twitter **@FENISummitCA**

INDUSTRY EXPERT: DUAL TRACK

Track 1

12:15 PM **CHALLENGING INVESTMENT BELIEFS:**

Providing guidance to your investment committee

A holistic approach to managing your not-for-profit pool is critical. How do you achieve investment returns while being consistent with your organization's mission and investment beliefs? In this session, we will discuss:

- Understanding who owns the investment beliefs
- Defining your investment beliefs – a practical approach
- How to challenge the investment belief structure – should they evolve or are beliefs fixed in stone?
- Capturing your beliefs in governance documentation

Adam Hornung,
Associate Director of Investment Strategy,
Russell Investments Canada Limited

Track 2

12:15 PM **THE RISE OF REAL ASSETS:**

How and why non-profit investors are using real assets to help achieve their missions

Real assets have become an integral part of the investment landscape in Canada. Indeed, Canadian institutional investors are widely recognized as leaders in Infrastructure and Real Estate investing by their global peers. But how can non-profit organizations capture the advantages, and manage the risks, associated with these asset classes? Join us for the opportunity to learn about key trends impacting real asset investing today including:

- The investment case for Real Assets
- The spectrum of available investment opportunities
- Overcoming implementation challenges in Infrastructure
- "Domestic-to-Global" ~ the case for gaining exposure to global Real Estate

Darren Spencer,
Client Portfolio Manager, Alternative Investment Management, **Russell Investments**

PLENARY SESSIONS CONTINUE

12:45 PM **Networking Lunch**

1:45 PM **INDUSTRY EXPERT: GREYBROOK**

TBC,
TBC,
Greybrook

2:15 PM **CASE STUDY: IMPACT INVESTMENTS**

Review Mission-Driven Impact Investment Strategies to Meet your Mandate

Organizations are re-thinking the way they are investing in causes closest to their missions. Create a business case for philanthropic investment to drive value for returns. Master the success factors to:

- Focus on reducing greenhouse gas emissions at scale
- Support healthcare and personalized medicine
- Invest in education and transform pedagogy through interactive tools

Develop your mission-related investment strategy while driving results.

Kathryn Wortsman,
Fund Manager,
MaRS Catalyst Fund

> **Conference is a crucial "must attend event" for all who wish to stay at the leading forefront of innovation and information, to best benefit their foundations."**
>
> — Melanie Hall-Szyszkiewicz, **Central Okanagan Foundation**

2:45 PM **CASE STUDY: HIGH YIELD BONDS**

Harness the Benefits of Role of High Yields Bonds in your Portfolio to Increase Returns

Adding a high yield bonds to a portfolio can be beneficial for investors looking to increase their income/return potential but are hesitant to increase their equity risk. Discover the pros and cons of incorporating HYB to your portfolio. Take away a plan to:

- Include HYB into your asset allocation to improve the risk-return trade off
- Clarify the impact of HYB for non-taxable investors with regular cash flows needs
- Take advantage of downside risk and the time to recuperate the loss

Change the way you look at HYB and incorporate them into your portfolio

Mario Lavallée,
Professor of Finance,
University of Sherbrooke

3:15 PM **Afternoon Networking Break**

Register today by calling **1-866-298-9343 x200**

3:45 PM **INDUSTRY EXPERT: SECURITY TOKENS**

How to Leverage Security Tokens as a New Investment Strategy

Digital assets and cryptocurrencies have seen a recent explosion in growth. But despite some obvious benefits of digital assets and cryptocurrencies, institutional investors have been slow to fully engage in this asset class. Find out how you can use security tokens via Security Token Offerings (STOs), to invest in cryptocurrencies. Take away strategies to:

- Understand what Digital Asset Issuances (DAIs) are
- How security tokens can be used in your investment strategy
- Clarify the risks associated with DAIs

Innovate your investment strategy with new cyrptocurrency technology

Jack J. Bensimon,
Chair, Endowment Fund, **Technion Canada / Technion - Israel Institute of Technology;** *Partner,* **BlockRake LLC**

4:15 PM **PANEL DISCUSSION:**

Cryptocurrencies as a Viable Asset Class for Endowments & Foundations

Institutional investors have been holding off on investing in the fledgling cryptocurrency asset. However, there is a small and growing group of endowments and foundations who see cryptocurrencies as a viable asset class with tremendous upside. Examine the issues involved assessing the risks and opportunities of investing in cryptocurrencies:

- Laying the groundwork to invest in cryptocurrencies
- Addressing the issue of volatility, security concerns and headline
- Assessing cryptocurrency index funds that are targeting institutional asset owners: custody issues
- Investing in Security Token Offerings (STOs) - digital issuances on the blockchain
- Liquidity issues with STOs

Explore opportunities of this new asset class

Moderator: Jack J. Bensimon,
Chair, Endowment Fund, **Technion Canada / Technion - Israel Institute of Technology**

Panelist:
John Doyle,
Chief Marketing Officer, **LinkChain LLC**

Rebecca Spour,
Chief Operating Officer, **Stealth_mode**

Marko Hafez,
President, **Blockstation Inc.**

5:15 PM **Conference Adjourns to Day Two & Executive Evening Reception**

DAY TWO Thursday, January 31, 2019

7:30 AM **Registration and Breakfast**

8:15 AM **Opening Comments from the Chair**

8:30 AM **KEYNOTE: SOCIAL TRENDS**

How New Social Trends Will Change Your Investment Strategy

Many social services are provided by the NFP sector, yet change in society is impacting how you invest in perpetuity. Gain insight into what changes are taking place, and what you need to do to continue to meet your mission. Take away strategies to overcome:

- Canada's Social Deficit
- Changes in personal giving
- How affluent Canadians have room to increase their support

Prepare to adapt your investment strategy to new social norms.

Bruce MacDonald,
President and CEO,
Imagine Canada

9:10 AM **CASE STUDY: BLENDED FINANCE**

Successfully Balancing Purpose and Profit in a New Era of NFP Investment

Innovative foundations and endowments are partnering with the for-profit sector to maximize the ROI on their investments. Drive change in your investment approach by adopting proven cutting-edge investment strategies. Gather intelligence on:

- How to implement impact investing, social enterprise, results-based financing, and blended finance
- What you should do to successfully adopt for-profit principles drive returns while meeting your mandate
- Creating profit motives from investing into social problems

Ensure your organization earns profit through philanthropic investments.

Patrick Murray,
Global Multi-Asset Client Portfolio Specialist,
Manulife Asset Management

9:30 AM **INDUSTRY EXPERT:**

Horizons ETFs Management (Canada) Inc.

TBA

Jaime Purvis,
Executive Vice-President,
Horizons ETFs Management (Canada) Inc.

9:45 AM **INDUSTRY EXPERT:**

The Evolution of the Canadian market

The Canadian market represents one of the best markets to invest in today, driven by our country's growth potential, solid balance sheet, superior corporate governance and attractive valuations. The discussion will show where we see highly attractive opportunities in Canada, based on our set of strict investment criteria and consideration of ESG factors.

Charles Nadim, CFA,
Co-Head of Equities & Portfolio Manager, Canadian Equities,
Jarislowsky Fraser

10:15 AM **Morning Networking Break**

10:45 AM **CASE STUDY: RESPONSIVE INVESTING**

Achieving a Double Bottom Line by Adopting a Responsive Investing Approach

Responsive Investing is no longer "niche," but still not "vogue". While many investors express concern that RI strategies generate lower returns, studies have historically indicated otherwise. Harness the benefits of RI in your organization to increase returns. Take away strategies to understand:

- How RI asset class investments compare on the risk/reward spectrum
- How to implement an RI investment program
- The performance debate: analyzing ESG ratings and correlation

Address potential opportunities, challenges, and solutions in RI investing in your organization

Simba Ndemera,
Chief Financial Officer,
Sierra Club Foundation (U.S.)

11:30 AM **PANEL DISCUSSION: CONDUCTING AN EFFECTIVE INVESTMENT MANAGER SEARCH**

A Practical Implementation Guide to Improve Your Money Manager Search, Selection and Evaluation

Mitigate risks, meet due diligence, and enhance performance through manager selection. Acquire tricks of the trade and avoid pitfalls when conducting your own search. Learn how to:

- Staff an investment committee with diversified expertise
- Design and implement a systematic selection process
- Uncover the process for conducting a manager search that prioritizes positive impact

Determine how to search and select asset managers for your mandate.

Sandra Hawken,
President and CEO, **Holland Bloorview Kids Rehabilitation Hospital Foundation**

Jory Cohen,
Director of Social Finance and Investment,
Insprit Foundation

Erik Mathiesen,
Chief Financial Officer, Mission through Finance,
The United Church of Canada

12:15 PM **Networking Lunch**

1:15 PM **CASE STUDY: ACHIEVING FINANCIAL AND MISSION-RELATED RETURNS**

Successfully Balance Mission and Financial Returns in Your Investments

Endowments must find the right balance between achieving both financial and mission related returns. With the right approach, your organization can achieve risk-adjusted financial returns, environmental impact, and demonstrate opportunities for impact investing to a wider community. Get insight into:

- Aligning investment policy and beliefs
- Utilizing the dynamics of direct investments: loans and other structures
- Establishing governance and internal capacity for impact investing
- Setting performance and metrics for evaluation of impact

Deploy more of your money in alignment with your mandate

Julia Langer,
CEO,
The Atmospheric Fund

1:45 PM **CASE STUDY: BLENDED FINANCE**

Successfully Balancing Purpose and Profit in a New Era of NFP Investment

Innovative foundations and endowments are partnering with the for-profit sector to maximize the ROI on their investments. Drive change in your investment approach by adopting proven cutting-edge investment strategies. Gather intelligence on:

- How to implement impact investing, social enterprise, results-based financing, and blended finance
- What you should do to successfully adopt for-profit principles drive returns while meeting your mandate
- Creating profit motives from investing into social problems

Ensure your organization earns profit through philanthropic investments.

David O'Leary,
Director of Impact Investing,
World Vision Canada

2:15 PM **Afternoon Break**

2:45 PM **PANEL DISCUSSION**

Mission-Related Investment Best Practices

Impact investment's definition remains broad, and various options exist. Explore impact investing avenues and develop strategies to achieve your mandate. Get practical insights from case studies to:

- Align investment priorities with your mandate
- Assess opportunities in the marketplace
- Develop your social and financial success metrics

Develop your mission-related investment strategy based on best market opportunities

Moderator: David O'Leary,
Director of Impact Investing,
World Vision Canada

Joe Belliveau,
Executive Director,
Doctors Without Borders Canada Presentation

Elena Haba,
Director of Investments (Acting), EWB Ventures,
Engineers Without Borders (EWB) Canada

Jocelyn Mackie,
Co-CEO,
Grand Challenges Canada

Annette Aquin,
CPA, CA, Executive Vice-President, Finance & Operations,
Hamilton Community Foundation

4:00 PM **CASE STUDY: ACTIVE OWNERSHIP**

Developing a Framework for Effective Responsible Investment Goals

As an active owner, endowments engage with companies and managers they invest in. Actively manage environmental, social, and governance practices to preserve long-term shareholder value and enhance your long-term returns. Take away strategies to:

- Enhance shareholder engagement and voting issues
- Advance your mission through shareholder voice
- Produce positive environmental, social, or governance impacts in public markets

Employ active ownership to achieve investment and mission goals

Kevin Thomas,
Executive Director,
SHARE Canada

4:30 PM **Conference Adjourns**

Connect with world leading Foundation, Endowment and NFP Investment practitioners

Be the answer to their biggest challenges!

EVENT SPONSORSHIP OPPORTUNITIES

AT CANADA'S LARGEST SUMMIT FOR FOUNDATIONS, ENDOWMENTS AND NFPS

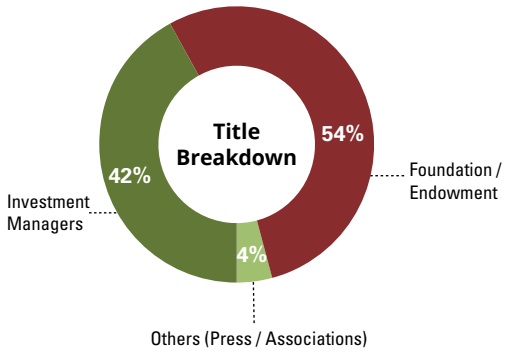
Critical thought-leadership and branding opportunities to cement your status as a leading investment manager. Meet foundations, demonstrate your expertise and become a go-to investment management firm.

TOP 5 REASONS TO SPONSOR

- Meet Leading Canadian Foundation and Endowment Leaders
- Become a Go-to Investment Management Firm
- Showcase your Investment Thought Leadership
- Demonstrate Innovative Investment Growth Opportunities
- 25+ Hours of Quality Face-time

*Limited exhibit space and sponsorship packages are available.

WHO YOU WILL MEET...



Your Conference Venue!

Explore the benefits and book your overnight stay today!

Hyatt Regency Toronto Hotel in the Entertainment District

Discover the excitement of Downtown Toronto's Entertainment District and all that makes the city a vibrant destination. You can explore the CN Tower, Rogers Centre, Royal Ontario Museum, and Princess of Wales Theatre – all in close proximity. Enjoy the fashionable shopping and dining scene within walking distance of the hotel. At the Hyatt Regency, you are immersed in the creative urban energy of Toronto.

Benefits of staying at the hotel include...

- **Networking:** Onsite social activities for conference attendees and speakers
- **Upscale Sevices and Amenities:** Exceptional on-site dining, roof top pool and StayFitTM fitness centre
- **Dining Experience:** King Street Social Kitchen, offers and eclectic dining and food culture experience. Savour creative regional cuisine in this unique restaurant
- **Accommodations:** The hotel rooms feature pillow-top Hyatt Grand Beds ®, ergonomic workstations with complimentary Wi-Fi, 47" TV
- **Convenience:** Hyatt Regency Toronto is conveniently located at 370 King Street Toronto, surrounded by over 150 restaurants, bars and clubs.

To Make Your Reservations, Please Contact Hyatt Regency Toronto Directly:

HYATT REGENCY TORONTO, 370 KING STREET, TORONTO, ON, M5V -1J9, CA | T: (416) 343-1234 | F: (416) 599-8889

Take advantage of our conference rate of $229.00/night, based on a first come basis, whilst rooms are available. Mention **"Foundations, Endowments, and Not-for-Profit Investment Summit by Strategy Institute"** when making your reservations. Limited rooms available.

IMPORTANT: Strategy Institute is not affiliated with nor do we contract any third-party room booking service. Please contact the hotel directly to make your reservations.

Don't Miss This Opportunity to be at the Centre of the Action!

To learn more, contact **Adrian Considine** at **416-944-9200 ext. 230** or email **adrian@strategyinstitute.com**

Follow us on Twitter **@FENISummitCA**

Pricing & Registration

Register Now

3 EASY WAYS TO REGISTER

Call
1-866-298-9343 ext. 200

Email
registrations@strategyinstitute.com

Register Online
FoundationEndowment.ca

CONFERENCE CODE: 119001	Foundation, Endowment, and Not For Profit	Regular Investment	Early Bird
Conference only	$1,295	$2,945	***SAVE $500*** Register by December 7th, 2018
			SAVE $300 Register by January 11th, 2019

SEND YOUR TEAM

REGISTER FOUR AND RECEIVE

25%

DISCOUNT

QUESTIONS?
Email us Today

Registration fee: Subject to 13% HST. This investment includes luncheon, refreshments, networking breaks, continental breakfast, and original course materials. Payment is required in advance and can be made by company cheque, VISA, MasterCard, or American Express. Please make cheques payable to Strategy Institute Inc.

Early Bird special: Expires on December 7th & January 11th, 2019. Cannot be used with group discount.

Group Discount: A Group Discount is offered for this conference (not in combination with any other offer). To be eligible for the Group Discount, delegates MUST register at the same time. The total discount per delegate (including applicable group discounts, etc.) MUST not exceed 25% of the regular conference costs.

Cancellations: Cancellations must be received in writing by January 16th, 2019. Cancellations received by this date will be eligible for a prompt refund less a $495.00 (plus HST) administration fee. If you register for the program and do not attend, you are liable for the full registration fee unless you cancel according to the terms stated above. If you are unable to attend, delegate substitution is permitted up to, and including, the day of the conference.

Admission Policy: Strategy Institute reserves the right to restrict entry to the conference to any individual. Any such person requested to leave the conference site shall do so immediately upon request, whether previously issued a badge permitting entry. There is no refund payable with respect to anyone refused entry. Any information obtained at the conference cannot be relied upon for any particular set of circumstances, cannot be taken as professional advice or opinion. Attendees must consult with the appropriate professional before acting in response to information obtained at the conference.

Evening Social Activities: Please drink responsibly. Strategy Institute shall not be liable for any consequential damages and/or personal injuries caused by excessive or irresponsible alcohol consumption.