Strategy Institute presents...

17th Annual

Foundation, Endowment & Not For Profit INVESTMENT Summit

Surpass your **INVESTMENT GOALS** and create **LASTING IMPACT!**

January 27 - 28, 2021 | The Intercontinental Downtown, Toronto, ON

Weather volatility, optimize your asset allocation and maximize your returns to meet your mandate

Meet + Network + Learn From:

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

Alex Yuchvid
Director of Investments and Financial Analysis – Office of the Treasurer,
Indiana University

Jason Krueger
President & CEO,
CBWC Foundation

Peter Muldowney
Senior Vice-President,
Connor, Clark & Lunn Financial Group

Nalini Feuilloley,
Director, Product Specialist I Responsible Investment,
BMO Financial Group I Asset Management

Jennifer Johnstone
President and CEO,
Central City Foundation

Take Away Key Strategies to:

- Maximize returns
- Diversify your asset allocation
- Explore new investment vehicles
- Exploit alternatives
- Improve your risk management
- Optimize your impact investing

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FoundationEndowment.ca

17th Annual

Foundation, Endowment & Not For Profit INVESTMENT Summit

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

Geopolitical turmoil is wreaking havoc on investment returns. With a fiduciary duty to ensure the success of your mission by guiding your organization through challenging markets, this summit will arm you with the most current success factors your peers are deploying.

This long-running, exclusive event is your chance to protect your investments. It is specifically created for Foundations, Endowments and Not-for-Profits, to help you gain practical advice to establish an effective investment strategy to meet your mandate by mitigating risks, and achieving better performance for your portfolio.

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

Your Foundation, Endowment and NFP Investment Team
Strategy Institute

Meet + Network + Learn From:

CIBC World Markets
Central City Foundation.ca
Canadian Baptists of Western Canada
London Community Foundation
Markham Stouffville Hospital
Indiana University
MaRS Centre for Impact Investing
VGH UBC hospital foundation
Amplify Capital
greenchip
Heart & Stroke Foundation of Canada

Event In Numbers

9 Case studies

10+ Networking hours

11+ Foundations Speaking

2 Keynotes

New for this year!

- Develop a true enterprise risk strategy for your organization
- Take advantage of the latest opportunities in private equity
- Navigate the most contentious compliance issues you will face
- Build better relationships with your finance committee
- Explore various impact investment models to determine which one is best for your organization
- Create policies that improve fund transparency
- Develop a step-by-step guide to establishing a social enterprise portfolio

Register online at **FoundationEndowment.ca**

Gain exclusive insights and knowledge on:

1. **Economic Climate:** Adapt to a possible downturn and market volatility
2. **Asset Allocation:** Take advantage of all asset classes
3. **Risk Management:** Mitigate your risk profile and improve financial stability
4. **Impact Investing:** Capitalize on the most profitable ESG and SRI investment options
5. **Fund Stewardship:** Drive transparency in your Investment Policy Statement
6. **Social Enterprise:** Develop a social enterprise strategy
7. **Alternative Assets:** Increase your returns with financially attractive alternatives
8. **Compliance:** Address the latest requirements you will encounter
9. **Investment Manager Relationship:** Improve how you manage your investment management team
10. **Long-term Returns:** Achieve your long-term investment goals

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

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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 27, 2021

7:30 AM **Registration and Breakfast**

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

Catherine Jackman,
Senior Institutional Director, Portfolio Manager,
Cidel

8:30 AM **Keynote: Economic Climate**

Responding to the Economic Uncertainties Putting Your Investments at Risk

Investment markets face many uncertainties in 2020. From tariffs to consumer confidence, get the latest economic outlook to overcome possible downturn and market volatility. Source intelligence to:

- Anticipate the impact of interest rate changes on your portfolio
- Discover trends in global markets and how they will affect investments
- Respond to short term trends while protecting your long-term investments

Create an action plan to capitalize on market volatility and protect your investments.

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

9:00 AM **Case Study: Indiana University**

Focus on Asset Allocation to Achieve your Long-term Investment Goals

With Operating Funds' AUM of $1.8 billion, Indiana University (IU) has access to an array of investment vehicles. Assess how IU manages financial assets to ensure sufficient liquidity, capital preservation, and optimization of investment earnings. Gain insights into:

- Fixed income investing
- Implementation of equity investing
- Portfolio optimization
- Fiduciary oversight

Transform your asset allocation approach to balance competing priorities such as liquidity needs, capital preservation, and total return.

Alex Yuchvid,
Director of Investments and Financial Analysis,
Indiana University

9:45 AM **Not Seeing the Forest for the Trees**

The Importance of an Asset Mix Strategy for your Long-Term Goals

Investment committees generally spend more time selecting managers than determining asset mix. Deliver on a more optimal approach to building your asset mix through better modeling and risk management. Create an action plan to:

- Determine what the key drivers are for meeting your investment objectives
- Meet future outcomes by giving asset mix strategy more prominence
- Achieve better outcomes through use of case examples

Build your future investment goals through a more strategic attention to your asset mix.

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

10:15 AM **Industry Expert: Private Debt**

What is Private Debt and how can you capitalize on this asset class?

Anemic yields in the traditional public fixed income markets has resulted in the private debt market growing in value. Transform your portfolio by taking advantage of private debt as an asset class to generate stable returns in the fixed income market. Gain a deeper understanding of:

- What is Private Debt, its challenges, and its value
- How you should allocate to this asset class
- The best time to invest in Private Debt, and whether it's a sustainable long-term option

Create an action plan for incorporating private debt into your alternative fixed income strategy.

Ramesh Kashyap,
Managing Director,
Ninepoint

10:45 AM **Morning Networking Break**

11:10 AM **ESG Hedge Funds**

Building a social enterprise portfolio of mission aligned initiatives that generate non-philanthropic revenue to fund growth

The Heart and Stroke Foundation has delved into the social enterprise space, and is showing some promising outcomes. For foundations looking to move into this area of activity, there are many great lessons to be learned. Source key insights into:

- Some of the challenges with developing a social enterprise strategy
- How Heart and Stroke launched Canada's first health related program funded by a 'social impact bond'
- Various opportunities to structure risk capital, including funding through 13 individual, nonprofit and for-profit investors
- How the program's outcomes trigger payments from the federal government that, if successful, generates both a social and a financial return for investors

Assess how you can take advantage of social enterprise initiatives to generated non-philanthropic revenue.

Doug Roth,
Chief Finance and Administration Officer and Head of Social Enterprise, **Heart and Stroke Foundation**

CHOOSE A TRACK

Portfolio Construction

11:40 AM **Diversification**

Innovative practices to increase diversification and stability in your portfolio

Diversifications remains an essential hedge against downside risks, yet foundations remain reliant on tired strategies and traditional models. Jump start your new diversification plan by applying new approaches to portfolio structure. Source innovative solutions to:

- Expanding beyond the traditional diversification models to optimize gains
- Determine the most appropriate diversification strategies for your organization
- Avoid the pitfalls of over diversifying and diluting income potential

Deliver higher returns through new diversification strategies.

Andrew Kitchen,
Managing Director, Canada Institutional,
Russell Investments Canada Limited

12:10 PM **To err is human**

Five Practical and Implementable Strategies to Ensure Your Investment Committee Members' Contribute to Your Organization's Success

Your investment committee is a integral component of your organization's ability to produce positive returns and build a successful investment strategy. Take a deeper dive into how you can achieve success by applying 5 best practices that will produce exceptional results. Improve the quality and efficiency of your investment committee's decision-making ability by:

- Overcoming our innate human biases to make more effective investment decisions
- Looking beyond the traditional framework from the past
- Educating and training the committee by utilizing your most experienced and effective decision makers
- Establishing clear guidelines to help ensure that you're constructing your committee thoughtfully with well-vetted leaders and members with diverse skills and backgrounds
- Providing IC members with practical guidance on meeting their fiduciary responsibility through proper debate and documentation

Explore the 5 key drivers that will help your investment committee generate better decisions and better results.

Kendra Kaake,
CFA - Director of Investment Strategy,
SEI

Alternative Investment

11:40 AM **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 many foundations and endowments. Historically investors have achieved above average returns through real estate, private equity/venture capital and even infrastructure. Source your plan of action to:

- Explore paying assets, such as infrastructure to realize higher and more stable gains
- Add more real assets in growing markets that can be safe alternatives to more risky asset classes
- Build new strategies for increasing investment income through asset ownership

Gain a solid plan to capitalize on how the illiquidity premium can increase your returns.

Darren Spencer,
Director, Client Portfolio Manager, Alternative Investments, **Russell Investments Canada Limited**

12:10 PM **Impact Investments and Indigenous Peoples**

Strategies to Build a Vibrant Reconciliation Economy in Canada

For many foundations and endowments, impact investments are an important component of their overall investment strategy. Learn how your organization can access Indigenous-led investment products that offer competitive returns and positively impact Nations, Metis, and Inuit communities. Build a blueprint for:

- Investing in scalable, purpose-drive Indigenous enterprises
- Investing in community-driven outcomes contracts (green bonds) in the renewable energy and health space
- Honouring your organization's commitment to Truth and Reconciliation with Indigenous peoples

Create an action plan for building an impact investmentportfolio that contributes to economic reconciliation.

Stephen Nairne,
Chief Investment Officer,
Raven Indigenous Capital Partners

12:40 PM **Networking Lunch**

PLENARY SESSIONS CONTINUE

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

1:40 PM **ESG and Impact Investing**

Responsible Investing Success Strategies in Practice

By now, all endowments and foundations have explored the concept of ESG and impact investment, with some translating these into the core of their investment strategy. Millennial investors, according to a new The Star research report are more likely to invest in sustainable funds, and are more likely to be loyal to organizations that do likewise. Master the success factors to:

- Understand the drivers of growth in ESG and impact investing spaces and how they should be implemented
- Better assess and evaluate the most effective ESG and impact investment strategies and what to demand of your managers
- Leverage your position as an asset owner through sophisticated active ownership practices

Build wealth and further your mission through more practical and strategic SRI solutions.

Nalini Feuilloley,
Director, Product Specialist I Responsible Investment,
BMO Financial Group I Asset Management

2:10 PM

Capturing the illiquidity premium through private investments

Private equity and private debt taps into big opportunities, with big fees and potentially big returns. Delve into the details of this sophisticated endowment model of investing through a robust discussion about the nuances of private investing. Develop an actionable plan to:

- Step into the private equity and private debt markets
- Pitch private investments to boards to see the value in planning for illiquidity in your risk budget
- Understand how it fits in a portfolio
- Gain on the ground insights into how to assess opportunities in this attractive investment arena

Take back unique perspectives and practical solutions on how to appropriately capitalize on these opportunities for your portfolio.

Robert P. Morgan,
Managing Director,
50 South Capital

2:40 PM **Afternoon Break**

3:10 PM **ESG 3 Ways**

How to implement a viable ESG Strategy That Aligns With Your Goals

ESG investment strategies are gaining more momentum among institutional investors, particularly foundations and endowments. Get some tips of how you might evaluate the progress of your own investment managers

- Learn about the common basic characteristics of managers who are at the forefront of ESG
- Appreciate some of the obstacles faced by managers in implementing ESG
- Understand what you might expect from different types of equity managers
- Know about the some of the ESG constraints most requested by institutional investors
- Gain a sense of whether you manager is ESG-dedicated or just ESG-washing

Andrew Bolton,
VP, **Hexavest**

3:40 PM **Panel**

Increase your Long-term Returns through a more Tactical Approach to Impact Investment

As government policies fail to adequately tackle environmental issues, foundations and endowments have filled the gap by investing in environmentally aligned companies. In many cases, the ROI has been above established benchmarks, and we are now seeing long-term returns continue to grow. Source practical and sustainable investment solutions to:

- Reap higher returns and deliver on your mission
- Capitalize on the highest growth – and most sustainable sectors – in the green economy
- Diversify beyond your comfort zone and build a more international portfolio

Optimize your sustainable investment strategy with a more tactical approach.

Moderator: Nalini Feuilloley,
Product Specialist I Responsible Investment,
BMO Financial Group I Asset Management

Eric Windeler,
Founder,
Jack.org

Tracey Haynes,
Manager - Investor Partnerships,
The Atmospheric Fund

Trish Nixon,
Director of Capital and Investments,
Vancity Community Investment Bank and CoPower Inc

4:25 PM

Navigating the Top Compliance Issues Facing Canadian Foundations

Foundations that are registered charities need to comply with corporate or trust law as well as Income Tax Act requirements. Prepare your organization for some of the most important compliance issues facing foundations as well as recent developments in compliance. Create an action plan to:

- Address the compliance obligations of donor-advised fund
- Assess the requirements of perpetual endowments
- Improve your compliance across a range of issues

Mark Blumberg,
Partner,
Blumberg Segal LLP

5:15 PM **Closing Remarks from the Chair**

5:20 PM **Evening Social Activities**

DAY TWO Thursday, January 28, 2021

7:30 AM Registration and Breakfast

8:15 AM Opening Comments from the Chair

Christy DeCosimo,
CFA - Senior Wealth Consultant, Investment Counsellor, **Cidel**

8:30 AM Case Study: Central City Foundation

A Mature Model of Impact Investing: A Practical Implementation Guide to Evolving Your Purpose

Foundations and endowments are very concerned with building their purpose to further their mission. In order to achieve this, they must both invest in areas that further their mission, but also produce sufficient returns to continue serving their communities. Acquire key insights into how you can:

- Appreciate what an emerging model of impact investment looks like
- Assess your current position and challenge your expectations
- Plan and implement a fruitful investment strategy that fosters social justice and truth and reconciliation
- Build an investment portfolio incorporating social purpose real estate

Uncover the process for evolving toward an emerging model of practice.

Jennifer Johnstone,
President and CEO,
Central City Foundation

9:15 AM Overcoming Low Fixed Income Yields

How to Capitalize on Obvious yet Overlooked Investments

Battling a low yield environment is proving a challenge for many foundations and endowments. Gain unique insight into how other organizations are experiencing higher yields, at lower risk. Source practical strategies to build wealth through:

- Assessing the current and future market for fixed income
- Accessing private commercial mortgages which are used extensively by Financial Institutions, Insurance Companies & Private Investment Managers
- Building a more profitable asset mix through a simple, widely available option for even smaller investors

Deliver on your mandate by overcoming a low yield environment.

Jeff Carrie,
Outsourced Chief Investment Officer,
Target Benefit Investment Consulting

10:00 AM

Alternative Investing for Endowments and Foundations That Produce Higher Returns

The variety of investment options continues to grow, and consequently, so does the various alternative investment vehicles. From forestry and agriculture, or infrastructure and real estate, alternatives can be a confusing labyrinth to negotiate. Source your plan of action to:

- Branch out into more exotic investments that are gaining increasing interest among investors – how far can you go?
- Successfully position your organization in alternative investments that fit your mandate and mission
- Perform effective due diligence to capitalize on more niche alternatives

Take back tactical strategies for exploiting more niche and lucrative alternatives.

Moderator: Michel Charron,
Investment consultant,
PBI Actuarial Consultants Ltd

Mark Braun,
Portfolio Manager,
CanFirst

10:30 AM Morning Break

11:00 AM

How to better respond to the spectrum of impact options to better diversify your portfolio – and get access to new deals

Impact investing is an important aspect of many endowment and foundation portfolios, but it is important to understand what the investment entails, the financial and impact considerations, and any insight in how it was developed. Delve into an exploration of three active investments - a fixed income / debt offering; a private equity / fund offering; and a public debt or equity offering. Create an action plan to:

- Improve your assessment of various impact investment options
- Better measure their impact, and your returns
- Create access to newer and more profitable impact options

Develop a comprehensive strategy to diversity your impact investments.

Adam Jagelewski,
Executive Lead, MaRS Centre for Impact Investing,
MaRS Discovery District

John Cook,
President,
Greenchip

Kia Kavoosi,
Senior Manager,
MaRS Centre for Impact Investing

Kathryn Wortsman,
Managing Partner,
Amplify Capital

11:45 AM **Speaker Spotlight: Risk**

Do you have the right heroes?

We all have role models that we try to emulate. In the investing world, almost everyone keeps an eye on how their portfolios perform compared with the broad benchmarks. Do you know what you're getting when you decide to invest this way?

- Although passive investing has many benefits, it is not perfect.
- What is your definition of risk?
- What alternative is there?

Ming Lam,
Co-founder,
Silver Heights Capital

12:00 PM **Networking Lunch**

1:00 PM **Panel: Transparency and Fund Stewardship**

Revisit your Investment Policy Statement to Ensure Transparent Fund Stewardship

Foundations face a growing need to ensure their community is engaged in their mission statement. For organizations committed to transparency, their IPS must reflect a more complex fund stewardship. Bring your governance to the next level an action plan to:

- Develop a bottom-up relationship with the community you serve
- Include the needs of your donors and community in your fund stewardship discussions
- Clarify your IPS to ensure it remains relevant to your community

Improve your fund stewardship governance to include greater transparency and community engagement.

Jason Krueger,
President & CEO,
CBWC Foundation

Mark Blumberg,
Partner,
Blumberg Segal LLP

1:45 PM **Spotlight: Investment Strategies**

Return on Mission: Leveraging Technology for Visibility, Insight, and Investment

Whether you are on the giving or the recipient side, measure, track, and report on the metrics that matter most to your organization. Ensure you get the greatest return on your mission by leveraging modern technology to gain real-time visibility and insight into their investments. Adopt new strategies to:

- Increase transparency to demonstrate fund compliance with donor wishes
- Confirm donations are used in an appropriate manner
- Monitor investments in real time, and report to all necessary parties more efficiently

Take away new strategies to demonstrate donor compliance and investment success.

Joan Benson,
Director, NFP Industry Marketing,
Sage Intacct

2:00 PM **Afternoon Break**

2:30 PM

Achieving A Viable Triple Bottom Line by optimizing your ESG/Impact Investing Approach

While many investors express concern that some ESG/Impact Investment strategies generate lower returns, studies have historically indicated otherwise. Harness the benefits of ESG/Impact Investments in your organization to increase returns. Take away important strategies to:

- Optimize returns and impact with targeted asset class of investments
- Implement an ESG investment program
- Assess and revised your impact investment mandate

Address potential opportunities, challenges, and solutions in impact investing in your organization.

MJ, Sinha,
Director of Finance,
Catherine Donnelly Foundation

3:15 PM **Closing Remarks from the Chair**

3:30 PM **Conference Adjourns**

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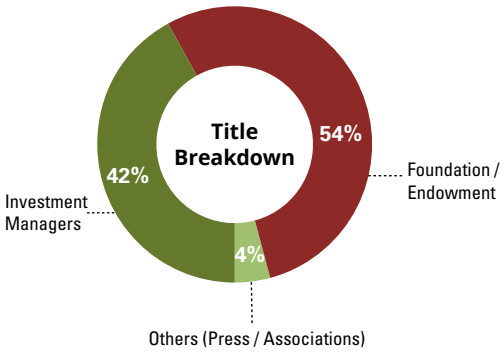

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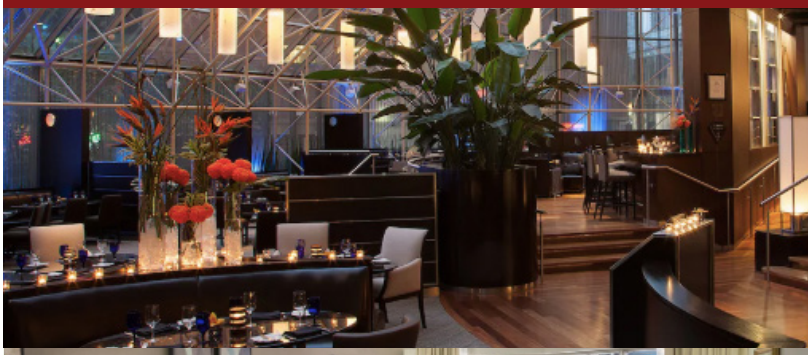

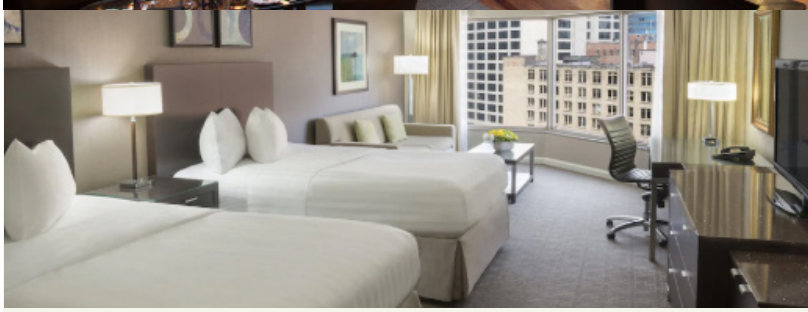

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