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CAIF

Canadian Alternative Investment Forum
2022



Thursday, April 28, 2022

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A TRUSTED ADVISOR TO SUCCESSFUL FAMILIES FOR CLOSE TO 100 YEARS.

At Richter Family Office our core belief is that families are best served by a completely independent and objective investment advisory platform. Built upon an open-architecture solution that provides access to unique and differentiated investment opportunities from around the world, our families benefit from fully outsourced, best-in-class solutions backed by a rigorous due diligence function. This, alongside the full spectrum of family advisory services including tax planning, cash and operations management, and estate planning provides our families with a truly integrated approach.

Richter Family Office is one of the largest, fully independent, family office service providers in Canada. We are proud to support the 11th Canadian Alternative Investment Forum.



CAIF
2022



WELCOME FROM THE CEO & FOUNDER

Dear Delegates,

Welcome to the 11th Canadian Alternative Investment Forum.

After our pivot to a virtual event in 2020, we decided not to host CAIF in 2021 given that Covid waves were wreaking havoc on the event industry. In 2022, however, we knew that no matter what, the show had to go on whether in person, virtually or both and thankfully we were able to offer our delegates both.

The sponsorship support for CAIF from the alternative investment community has been outstanding and we thank all of our sponsors sincerely for being on board.

If we were to ask ourselves how Covid has impacted us both personally and professionally I am sure we would all have some interesting stories to share. Some good, some surprising, some inspiring and some challenging. I imagine that we all have stretched one way or another through the pandemic into some profound and revealing self-discovery. I know I have.

When I thought about what I wanted to say in this welcome letter to all of you, my thoughts all simply pointed to the word "gratitude". The investment industry as a whole continued to do very well through the entire pandemic and in many cases has thrived and expanded. My 18-year-old firm has just had its best two years ever in 2020 and 2021 and is on a new growth trajectory. As our past keynote speaker Mike Lipkin once said to CAIF delegates, "Anyone who is sitting in this room is a fortunate person," and he was so right. Many industries did not do well during Covid and many people have had to work tirelessly and through fear to pivot, adapt, sacrifice and re-invent. These are the stories that will count.

Yes, inflation is real and everything is much more expensive and the Covid virus is here to stay and, and, and...but we are here, in this room together so that we can learn from expert speakers, network with our peers and celebrate our good fortune.

With warm regards,

Karen Azlen

WELCOME



FIERACAPITAL



LEADER IN PRIVATE MARKET INVESTMENTS

Fiera Capital Corporation is a leading independent asset management firm with a well-recognized global presence. We are proud to deliver investment excellence across a range of public and private market strategies including agriculture, infrastructure, private credit, private equity, real estate and diversified solutions.

fiera.com



The 11th Canadian Alternative Investment Forum

All presentations, conversations and panels will be followed by a short Q&A

8:00 am Registration and Continental Breakfast

8:30 am Welcome

Karen Azlen, CEO, Introduction Capital Inc.

8:45 am Opening Keynote

What's the Answer to All Investment Questions? "It Depends"

David Kaufman, Westcourt Capital

Opening
Keynote
8:45AM

Candid Conversations

9:30 am How Global Volatility and Recent Geo-political Events are Affecting Asset Markets and Portfolio Construction

James Donegan, AGAWA Partners
Gregory Moore, Richter Family Office

10:10 am Examining the Risk / Return Spectrum of Private Credit Strategies

Ryan Dunfield, SAF Group
Ash Lawrence, AGF Investments

10:50 am Networking Break

Networking
Break
10:50AM

Candid Conversations

11:10 am The Evolution of Private Alternatives in the Past Decade

Anik Lanthier, Fiera Capital
Caroline Grandoit, Fiera Capital

11:50 am Understanding Carbon as an Emerging Asset Class

Michael Azlen, Carbon Cap Management
Vincent Fernandez, Canada Overseas Asset Management Limited

12:30 pm Networking Lunch

Networking
Lunch
12:30PM

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AGENDA



APRIL 28

Spotlight Panel

1:30 pm Planning for Uncertainty and Volatility: A Modern Day Balanced Approach

Moderator: Emily Newman, Wealhouse Capital Management

Scott Morrison, Wealhouse Capital Management

Andrew Labbad, Wealhouse Capital Management

Panel Discussions

**2:15 pm Non-bank Mortgage Lending:
Why This Alternative to Fixed Income Continues to Be Compelling**

Moderator: Djenane Cameron, Reddick Wellington Investments

Rob Goodall, Atrium MIC / CMCC High Yield MIC

Lisa Stewart, Neighbourhood Holdings

Sandy Poklar, Firm Capital

3:00 pm Networking Break

Networking
Break
3:00PM

**3:20 pm Dispelling Misperceptions About Real Asset Investing:
Why They Deserve a Second Look**

Moderator: Angela Vidakovich, Fiera Capital

Kent Willmore, AGinvest Farmland Properties Canada

Voyt Krzychylkiewicz, Northwood Family Office

Rajeev Viswanathan, Forum Equity Partners

4:05 pm Private Equity Secondaries: An Expanding and Game-changing Market

Moderator: Tom Kapsimalis, CPPIB

John Fisher, Bridgeport Asset Management

Tori Buffery, Morningside Capital

Matthew Sparks, Northleaf Capital Partners

4:50 pm Closing Remarks, Acknowledgments and Door Prizes

Reception

5:00 pm Networking Cocktail Reception

Live Jazz Trio

Networking
Reception
5:00PM

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Established in the summer of 2008, Wealhouse Capital Management is an independent, privately owned alternative asset manager with over \$1.4 billion in assets under management that provides award winning investment strategies to ultra-high net worth individuals, family offices and advisors. For over a decade, Wealhouse has been entrusted with capital by Canada's wealthiest families and entrepreneurs with the goal of growing and protecting their hard-earned capital.

Our investment philosophy is based on a fundamental, bottom-up approach. We believe superior investment performance can only be achieved through proprietary research. We comb the globe for businesses with great long-term growth potential in earnings and free cash flow. We look for companies with proven business models, strong balance sheets, above-market profitability, and best-in-class management teams.



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Founded in 1957, AGF Investments Inc. [AGF] is an independent and globally diverse asset management firm. AGF brings a disciplined approach to delivering excellence in investment management through its fundamental, quantitative, alternative, and high-net-worth businesses focused on providing an exceptional client experience. AGF's suite of investment solutions extends globally to a wide range of clients, from financial advisors and individual investors to institutional investors including pension plans, corporate plans, sovereign wealth funds, and endowments and foundations.



Fiera Capital Corporation is a leading independent asset management firm with a growing global presence, committed to serving every client across North America, Europe and Asia. As one of Canada's largest independent asset managers with approximately C\$188.3 billion in assets under management as at December 31, 2021, we differentiate ourselves by our active approach to investment management and by offering a full suite of customized, multi asset solutions across both public and private market asset classes.

Our success is driven by our employees, including close to 250 investment professionals, who leverage their talent and expertise to act as trusted partners to our clients, providing investment insights and tailored solutions that cater to their specific investment needs. Our professionals have a broad range of skills and are supported by an agile entrepreneurial culture and an aligned global leadership team. Our international presence is supported by deep local expertise enabling us to serve clients in the institutional, financial intermediary and private wealth channels. Our global reach allows us to meet the needs of the most sophisticated investors, including those seeking both asset class and regional diversification.





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RICHTER FAMILY OFFICE

Richter is the largest independent business and family office firm in Canada. We assist some of Canada's most prominent entrepreneurs, business owners, and business families in managing their generational needs, optimizing business operations, reaching personal financial goals, and crafting their legacies. The firm's 60 partners and 500 team members offer holistic advisory to clients, with expertise which includes wealth management and family office services; estate planning; real estate advisory; governance, philanthropic, and insurance advisory; cross-border, Canadian, and U.S. tax; valuation, litigation, and transaction advisory; forensic accounting, restructuring and insolvency; cybersecurity and risk management; executive search; and audit and assurance. Richter was founded in 1926 and its team continues to expand with offices in Montreal, Toronto, and Chicago.





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Carbon Cap is a London-based environmental investment company running the World Carbon Fund which invests globally into liquid and regulated carbon markets. The Fund’s objectives are to generate absolute returns with a low correlation to traditional asset classes and to have a direct impact on climate change. The Fund deploys capital across two complementary strategies within a clearly defined risk framework: “Core Long” and “Alpha Strategies”. The “Core Long” Strategy seeks to generate returns from long-biased allocations across carbon markets combined with an options overlay. The “Alpha Strategies” seek to generate returns from arbitrage, volatility trading and other short term trading strategies. The Fund is an Article 9 fund under the EU’s Sustainable Finance Disclosure Regulation [SFDR]. It seeks, through its investment activities, to contribute directly to the reduction in global CO2 emissions targets. In addition, 20% of the performance fees generated by the Fund are committed to the purchase and permanent cancellation of carbon allowances/ offsets.



Founded in 2009, Westcourt Capital Corporation advises on \$5B in assets for Canadian ultra-high-net-worth families. Focusing generally on the alternative investment universe, and specifically on investable real assets that provide both inflation protection and tax-efficient yield to its clients, Westcourt is a leader in the areas of alternative asset manager sourcing, structuring, due diligence, and monitoring. Westcourt also provides a valuable resource to its clients as they navigate the areas of tax and estates, working hand-in-hand with highly curated third-party professionals to establish holistic solutions for multi-generational challenges.

David Kaufman and Robert Janson are Westcourt’s co-CEOs who lead a team of 35 professionals who share a common mission of maintaining Westcourt’s position as the leading advisors to Canada’s wealthiest families.





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AGinvest Farmland Properties Canada [AGinvest] is a farmland investment manager with a mission is to serve both investors seeking a superior alternative investment and farm families seeking a farm-centric capital partnership.

The team at AGinvest works to optimize all assets under management and sustainably protect Ontario farmland for generations to come. By improving the productive characteristics of the farms under management, AGinvest consistently adds value for both farm families and investors.

At AGinvest, the principals approach farmland investing from the farm side of the equation, which is an approach that yields superior returns when compared to all other Canadian farmland investment strategies. Core ESG principles provide opportunities for younger generations of farmers to grow and expand their operations. The long-term nature of farmland investments and the ability to implement sustainable practices on the land allows AGinvest to protect and enhance natural capital while also delivering stable investment returns.



Cortland Credit is a Canadian domiciled asset management firm focussing on short-term private debt. We provide bespoke financing solutions to established companies across Canada, the US and Western Europe looking to scale their business. Our expertise and collective experience in the field allow us to leverage deep origination networks and operate across the spectrum of borrowers, evaluating opportunities on a case-by-case basis. Our conservative underwriting is underpinned by detailed oversight of our borrower's operations, giving assurance to ourselves and our investors around the protection of their capital. Our portfolio targets senior secured, floating rate loans generally with a term of one year or less. The strategy attracts the majority of its AUM from Canadian institutions seeking a range of factors including diversification, yield enhancement and duration mitigation.





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CANADIAN MORTGAGE CAPITAL
CORPORATION

Canadian Mortgage Capital Corporation [CMCC] is a major asset manager in the real estate industry with \$1.8 billion of assets under management. The company is based in Toronto and has three offices across Canada.

CMCC is involved in both debt and equity investments, and has four primary platforms which it manages exclusively on behalf of various shareholders and investors. These funds traverse the full risk spectrum, from low-risk institutional mortgage funds to higher-risk debt and equity funds:

Debt Platforms:

[i] **Atrium Mortgage Investment Corporation [Atrium]:** One of Canada's largest non-bank lenders with \$800 million of assets under management. Atrium has a 21-year history of consistent earnings and uninterrupted dividends. Atrium trades on the TSX under the symbol "AI".

[ii] **CMCC High Yield Mortgage Investment Corporation:** A private mortgage investment corporation which was conceived in early 2020. The risk profile of this fund is higher than Atrium, although the current average loan to value in the portfolio is still moderate at 68%. The goal of this high yield fund is to target earnings and dividends to shareholders in the range of 10% per annum.

[iii] **Institutional Senior Funds:** These funds are managed on behalf of institutional investors, and include pension funds and high net worth families. The funds have a very low risk profile, with an historic average loan to value in the 50-60% range, and an average yield of 5.0% per annum.

Equity Platform:

CMCC Capital Group of Funds: since 2011, CMCC has formed five private real estate funds, totaling approximately \$405 million in committed capital as well as a further \$67 million in parallel investments. Most of the investments are with long term developer clients of CMCC. The Funds primarily invest in projects located in major urban centers in Ontario and B.C. where CMCC has established operations and local market knowledge. CMCC Capital Funds have successfully adapted their investment strategies for each of the four Funds, based on the prevailing real estate conditions at the time. CMCC has consistently exceeded its minimum targeted annual return to unitholders of 15%.





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ICM Asset Management is an alternative asset manager focused on owning, operating, and investing in real assets. We offer retail, private client and institutional investors an array of investment opportunities focused on real estate, private equity, private debt, and infrastructure strategies.

Our goal is simple: we strive to preserve wealth and generate attractive risk-adjusted returns, while providing the highest level of client service.

We are headquartered in Calgary and have offices in Atlanta, Munich, and Mexico City. ICM Investment Management, a wholly owned subsidiary of ICM Asset Management, is a registered investment fund manager [IFM] and portfolio manager [PM] with provincial securities regulators across Canada.



Neighbourhood Holdings is an alternative residential mortgage fund that lends from coast to coast across Canada. Neighbourhood was born out of a single-family investment office in 2015, and its founding principles remain true today: providing accessible mortgage financing solutions for homeowners across Canada while generating stable returns for investors. Neighbourhood lends to borrowers in transition who are temporarily outside the prime borrowing space. Today Neighbourhood manages a portfolio of over \$350 million in assets across Canada and targets net annualized returns of 7.5% to 8.5%.



COCKTAIL RECEPTION
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TD Securities is a leading corporate and investment bank. Operating out of 16 offices in key financial centres, we offer a full suite of capital markets products and services to our corporate, government, and institutional clients around the world. Our services include underwriting and distributing new issues, providing trusted advice and industry-leading insight, extending access to global markets, and delivering integrated transaction banking solutions.

Our Prime Brokerage team offers a comprehensive suite of client-centric services to alternative investment managers, institutional investors, and family offices. We provide custom solutions relevant to our clients' businesses, hands-on guidance from highly experienced professionals, and the reliability of the Toronto-Dominion Bank [TD], one of the world's safest counterparties.





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KEYNOTE SPEAKER



David R. Kaufman

CEO

Westcourt Capital Corporation



David brings over 20 years of experience in the legal, real estate and investment fields to his role at Westcourt Capital Corporation.

After graduating from the University of Toronto, Faculty of Law, in 1994 and completing his articles at Goodmans LLP, David held various positions in hospitality management, real estate and private equity, including leading roles at Magna International, Menkes Developments and Lynx Equity.

In 2009, he founded Westcourt Capital with the goal of building an advisory firm focused on alternative approaches to portfolio construction and the sourcing, due diligence and monitoring of investment funds for high net worth and institutional clients.

David is a thought leader in the alternative investment industry and often appears at industry conferences and events in the roles of keynote speaker, moderator or panelist. He is a regular contributor to the Financial Post and co-hosted BNN's 'Alternative Investing' from 2010 to 2011. David was also a guest host for CBC's 'The Lang and O'Leary Exchange' and its successor, 'The Exchange'. He has been a member of two committees of the Ontario Securities Commission, providing insight into the areas of capital formation and investor protection in the private capital markets.

Currently, David is a member of the Board of Directors of the Mount Sinai Hospital Foundation and sits on its Investment Committee. He is also a member of the Board of Directors of Dream Alternatives, an alternative asset manager listed on the Toronto Stock Exchange, and the Chair of its Governance, Compensation & Environmental Committee.

David is a Chartered Alternative Investment Analyst [CAIA] Charterholder and is a member of the Law Society of Upper Canada, the Private Capital Markets Association of Canada, and the National Exempt Market Association. He sits on Westcourt's Executive and Investment Committees.



KEYNOTE
SPEAKER



Michael Azlen
 CEO & Co-portfolio Manager
 Carbon Cap Management

Michael Azlen is a senior investment professional with 25 years spanning proprietary trading, hedge funds and multi-asset investing. He has completed deep research into climate change and carbon as an asset class and holds a Sloan Master’s Degree in Leadership and Strategy, London Business School.

In 2018, Michael founded Carbon Cap Management LLP. The Company’s mission is to raise awareness about climate change and to provide solutions directly related to the capping and reduction of carbon dioxide emissions.

The Company launched the World Carbon Fund in February 2020 which invests into multiple liquid and regulated carbon markets and aims to generate strong uncorrelated returns and a direct impact on carbon emissions.



Tori Buffery
 Partner
 Morningside Capital Management

Tori is involved with all aspects of the firm's investment process and leads Morningside's single asset secondary strategy and fund. In 2018, she was named by Private Equity International to their annual “Young Guns of Secondaries” list.

Prior to joining Morningside in January 2016, Tori worked in the Funds, Secondaries and Co-Investments team at the Canada Pension Plan Investment Board [CPPIB] in Toronto, Canada and London, UK. While at CPPIB, she gained extensive experience in private equity, investing \$5.3 billion in the asset class including \$1 billion in principal secondaries. During this time, she also served as a member of the Institutional Limited Partners Association’s Education Committee. Tori currently serves on the Board of Urban Squash Toronto, a not-for-profit supporting at-risk youths, and the Finance Committee of the North York Harvest Food Bank.

Prior to joining CPPIB, Tori worked at BMO Capital Markets. She holds an Honours Bachelor of Business and Administration degree from Wilfrid Laurier University.





Djenane Cameron

CIO
Reddick Wellington Investments



Djenane brings over 20 years of experience to her role. She is responsible for building relationships, oversight, and guiding investment decisions across a large, diverse portfolio comprised of real estate, private debt, public market equities and private equity.

Prior to joining Reddick Wellington, Djenane held a number of positions in asset management and private equity including Head of Mergers and Acquisitions at Lynx Equity Investments, Managing Director of JovFunds Inc [the asset management arm of Jovian Capital Corp.], Vice President of EdgeStone Capital Partners and Manager of Working Ventures Labour Sponsored Fund.

During her career, Djenane has sat on numerous boards and investment committees. She currently sits on the board of EverGen Infrastructure Corp. and is on the credit committee of Peakhill Capital, a commercial mortgage and mezzanine debt lender. She holds a Master of Business Administration from Ivey Business School at Western University and a Bachelor of Arts degree from McGill University.



James Donegan

Co-founder
AGAWA Partners



James has over thirty-five years of investment experience in the pension management and investment dealer industries. For 21 years he worked as an investor in public market roles at OMERS. From 2007 - 2015 he was President of OMERS Capital Markets and ultimately responsible for all publicly traded investment portfolios including equity, fixed income, currency, hedge funds as well as all aspects of risk management. He was a member of the OMERS Executive Senior Leadership team. In his role at OMERS he implemented a complete separation of portfolio Alpha and Beta in the capital markets portfolio, established the process of risk budgeting and created the risk-balanced approach to managing portfolio Beta that will be the investment strategy pursued in the Fund.

James has served on a number of Boards and Committees through the course of his career including as an independent Director on the Board of Directors of the Investment Industry Regulatory Organization of Canada [IIROC] and is currently Chairman of the Investment Advisory Committee of the Archdiocese of Toronto. James has a BA in Economics from Carleton University, an MA in Economics from the University of Toronto and is a Chartered Financial Analyst and certified Chief Risk Officer.





Ryan Dunfield

Managing Principal & CEO
SAF Group

Mr. Dunfield is responsible for the overall strategic mission of the business as well as capital raising and investment management, playing an active role with major transactions and realizations.

Prior to founding the SAF Group, Mr. Dunfield worked at an event-driven hedge fund, a Vancouver-based private equity manager, and, earlier in his career, at ATB Financial in its corporate and investment banking group. Over the past decade, he has served on the board of several public and private entities.

Mr. Dunfield, who is originally from Vancouver, British Columbia, earned his B.A. in Economics from the University of Calgary with a minor in Commerce.



Vincent Fernandez

CIO
Canada Overseas Asset Management Limited

Vincent Fernandez is the Chief Investment Officer for Canada Overseas Asset Management Limited, a single-family office based in Toronto, servicing a Toronto and West Coast based Family. Prior to assuming this role in 2008, he was with two of the leading mutual fund platforms in Canada investing in Global and Emerging Markets. He started his career as a sell-side analyst in Buenos Aires, Argentina covering utilities. He holds an Honours Bachelors in Political Science and Economics from U of T, an International MBA from Schulich at York University and is a CFA charter holder. He sits on the investment sub-committee for the Heart and Stroke Foundation.



John Fisher

President & CIO
Bridgeport Asset Management

Bridgeport Asset Management is a Toronto-based wealth management firm that offers a variety of investment strategies including those focused on private credit, private equity, private real estate and infrastructure and commercial litigation finance. Prior to starting Bridgeport in 2007, John was a Managing Director at Clairvest Group, a Toronto-based private equity firm, and worked in corporate finance, business valuation and audit at PricewaterhouseCoopers.



Robert Goodall

President, CEO & Founder
Canadian Mortgage Capital Corporation

Canadian Mortgage Capital Corporation [“CMCC”] has \$1.6 billion of assets under management, and its four primary platforms are: [i] managing the operations of Atrium Mortgage Investment Corporation, an \$800 million non-bank lender which trades on the TSX, [ii] managing various private real estate funds, totaling over \$320 million in equity, that invest with major developers across Canada, [iii] managing a private high yield debt fund, and [iv] managing lower yielding senior debt funds on behalf of institutional clients.

Prior to founding CMCC, Mr. Goodall spent seven years with Royal Trust, where the last three years were served as National Managing Director of the Real Estate Finance Group with a portfolio of \$1.4 billion in commercial and multi-residential real estate loans. Mr. Goodall is a trustee of two publicly held REITs and former director of a registered charity, Jump Math. Mr. Goodall has an HBA from the Ivey Business School, and an MBA from the Schulich School of Business.





Caroline Grandoit

Global Head of Total Portfolio Solutions
Fiera Capital

Caroline Grandoit leads the Total Portfolio Solutions group which is our client-focused and goal-based portfolio management business. She is responsible for structuring, implementing and monitoring customized multi-asset mandates and pooled funds as well as risk targeted and immunized liability driven portfolios. Furthermore, she oversees the research and development supporting Fiera's MACS model [multi-asset class solutions], our proprietary risk factor-based asset allocation tool, and is a frequent speaker at industry conferences. She works closely with all segments of Fiera to offer the best solutioning capabilities to our global institutional and private clientele.

Ms. Grandoit joined the firm in 2017. Her career in the financial industry spans over 15 years working both in the United States and Canada, helping clients in her portfolio management, financial strategy and actuarial roles. She specializes in asset-liability modeling, portfolio projections and customized strategic asset allocation optimization.

Ms. Grandoit is a graduate of Concordia University in Montreal where she studied Actuarial Mathematics and Finance. She is also a CFA charterholder [CFA], a Fellow of the Society of Actuaries [FSA] and a Certified Enterprise Risk Analyst [CERA].



Tom Kapsimalis

Senior Member
CPPIB

Tom is a senior member of CPPIB's Private Equity Secondaries team and is responsible for originating, leading and managing secondary investments in North America and Europe. Tom has been with CPPIB since 2012 and is based in Toronto, having also spent time in London to help grow CPPIB's Secondaries business in Europe and establish a hedge fund co-investment business within CPPIB's External Portfolio Management team. Prior to joining CPPIB, Tom worked in Investment Banking with TD Securities in New York.





Voyt Krzychylkiewicz

Vice President, Client Services
Northwood Family Office

Voyt has 20 years of financial services experience working as an investor and executive in the financial services and property industries. He has also sat on 13 private and public company boards in Canada, Europe and Africa.

Voyt previously held a number of senior roles in South Africa including being the Chief Investment Officer at a \$20bn publicly traded family office and CEO of a \$3bn property investment group. After moving to Canada in 2017, Voyt has worked with a number of family offices and privately owned operating companies in Canada and the US. He is currently the Chair of the Investment Committee at Northwood Family Office and Head of Client Service for Northwood's Outsourced Single Family Office solution.



Andrew Labbad

Senior Portfolio Manager
Wealhouse Capital Management

Andrew James Labbad, CFA is the portfolio manager of Amplus Credit Income Fund. Mr. Labbad joins Wealhouse after almost a decade at TD Securities, where he was a Director of Credit Trading. A native of Montreal, Mr. Labbad is fluent in both French and English. Mr. Labbad received his Master of Business Administration from John Molson School of Business at Concordia University and Bachelor of Engineering from McGill University.





Anik Lanthier

President & CIO, Public Markets
Fiera Capital

In her role, Anik leads all Public Markets activities globally with a focus on the growth and evolution of our Public Markets investment platform, including our equity, fixed income, liquid alternatives and multi-asset solutions offering.

Ms. Lanthier has more than 20 years of investment management industry experience and joined the firm in 2020. Prior to joining Fiera Capital, she was Senior Vice President and Global Head of Capital Markets at PSP Investments, where she oversaw the internal fixed income, equity, and absolute return investment teams, as well as its external manager platform and public markets operations and trading functions.

Previously, she spent seven years at the Hydro-Québec Pension Fund where she held several portfolio management positions of increasing responsibility. She began her career as a financial analyst at the Bank of Canada in 1997

Ms. Lanthier also serves on the board of directors of Finance Montreal, as well as on the investment committees of the Azrieli Foundation and the McGill University Foundation.

She holds a Bachelor's degree in Business Administration and a Master's degree in Finance from Université Laval. She has been a CFA charterholder since 2000.





Ash Lawrence

Senior Vice-President & Head of Alternatives
AGF Investments Inc.

Ashley [Ash] Lawrence joined AGF as Senior Vice-President and Head of Alternatives in February 2022. He is a seasoned leader with a wide breadth of expertise in investments and asset management within the Alternatives sector.

Ash brings the right combination of strategic thinking, deep experience, and strong relationships to drive the growth of AGF's Alternatives business, which is central to the firm's mission to bring stability to the world of investing. He has approximately 20 years of private alternatives experience in global markets, including 16 years with Brookfield Asset Management where he most recently led the firm's Canadian real estate business. Prior to that, he worked at a real estate company managing development strategies and the financing of municipal infrastructure projects. He also worked as an engineering consultant, developing infrastructure, traffic planning and parking solutions for real estate and government clients.

Ash earned an MBA from the Rotman School of Management and a Bachelor of Applied Science, Civil Engineering, from the University of Waterloo.



Greg Moore

Partner
Richter Family Office

Greg is a seasoned wealth management professional with almost 30 years' experience in global financial markets, working with individuals, institutions, and family offices. Greg brings a unique, holistic approach to wealth management in a segment of the market that sees value in working alongside an independent, trusted advisor as part of their overarching solution.

By incorporating his experience as a Family Enterprise Advisor [FEA], Greg also works alongside families to help them navigate the complexities of wealth and legacy transmission. Bringing together both a technical investment management skill set, as well as a deep understanding of relational family and enterprise strategy issues, he strives to help families address complex problems through open communication, trust and understanding.





Scott Morrison

Founder & CIO
Wealhouse Capital Management

Scott Morrison, CFA is a Bay Street veteran with over 25 years of asset management experience. Prior to founding Wealhouse as the chief investment officer, Mr. Morrison researched and managed portfolios for notable firms such as Mackenzie Investments, CI Funds, and Investors Group. A keen supporter of philanthropy, Mr. Morrison generously volunteers his time advising various charities and non-profits such as the Centre for International Governance Innovation [CIGI].



Emily Newman

Executive Vice President, Sales
Wealhouse Capital Management

Emily Newman joined Wealhouse in August 2021 and is responsible for leading capital-raising initiatives as well as overseeing client management and marketing. Prior to joining, Emily held multiple roles including Senior Vice President of Sales and Vice President of Sales for a private alternative asset manager and was responsible for leading the capital raise team with investment partners across Canada that included institutional, family office and retail investment advisors, and portfolio managers.

Emily started her career in equity research with a boutique oil and gas investment bank based in Calgary, Alberta. Ms. Newman is working towards her CIM designation and has a Bachelor of Science in Chemistry from Queen's University.





Sandy Poklar

COO & Managing Director
Firm Capital

Sandy Poklar is currently the Chief Operating Officer and Managing Director, Capital Markets & Strategic Developments for Firm Capital Corporation, EVP Finance for Firm Capital Mortgage Investment Corporation [TSX: FC], Chief Financial Officer and a Trustee for Firm Capital Property Trust [TSX: FCD.UN] and President & CEO of Firm Capital Apartment REIT [TSXV: FCA.U/FCA.UN]. Sandy is also a Trustee for True North Commercial REIT [TSX: TNT.UN].

Prior to joining Firm Capital, Sandy was employed at Macquarie Capital and TD Securities where he was a Vice President in their Real Estate Investment Banking Groups. Sandy is a CPA, CA in Canada, a CPA [US] licensed in the State of Illinois and has his ICD.D designation.



Northleaf

Matthew Sparks

Managing Director
Northleaf Capital Partners

Matthew participates in all aspects of Northleaf’s private equity investment activities, with a focus on the origination, evaluation and monitoring of secondary investments.

Prior to joining Northleaf in 2010, Matthew was a consultant with Monitor Group where he worked on various acquisition, due diligence, growth strategy and post-merger integration projects for clients in a range of industries, including media, retail and business outsourcing.

Matthew received an H.B.A. [Business] with distinction from the Ivey Business School, University of Western Ontario.





Lisa Stewart

Chief Revenue Officer
Neighbourhood Holdings

In Lisa's role, she manages fund flows, including raising debt and equity capital, and leads the sales team to drive mortgage sales strategy. Her role involves working closely with the CEO and Board of Directors to execute on strategy and vision.

Lisa is a Chartered Professional Accountant [CPA]. Prior to her time at Neighbourhood, she worked in Assurance and Transaction Advisory Services, Leveraged Finance, and Equity Research. During Lisa's time in Equity Research, she covered mortgage originators, mortgage insurers, and CMHC, which piqued her interest in the mortgage industry.



Angela Vidakovich

Senior Vice President,
Private Alternatives, Institutional Markets
Fiera Capital

As a member of the Institutional Markets team Angela is responsible for client servicing and business development for institutional clients for private alternative investments.

Angela has more than 30 years of financial industry experience focused primarily on real asset investing business development in both private and public markets. Prior to joining Fiera Capital, Angela worked for a major global alternative investment firm where she was responsible for business development for its Canadian public securities group covering both institutional and wealth management channels. She has experience providing client service to large institutional investors, complex financial services organizations, and advisor channels. Angela is also experienced in financial operations from working for a global leader in asset servicing securing several of Canada's premier pension plans as clients.

Angela has a Bachelor of Arts, Commerce and Economics from the University of Toronto. She also holds the Canadian Investment Manager [CIM] designation.





Rajeev Viswanathan

Managing Partner & CFO
Forum Equity Partners

Rajeev has worked with some of the largest Canadian real estate and asset management firms with global platforms, joining Forum to help the firm achieve its strategic growth objectives.

At Forum, Rajeev is responsible for the overall financial management of the firm, including financial strategy, planning, controls, risk management, tax, information technology and reporting. Rajeev is also responsible for ongoing asset management oversight of the firm’s investments and sits on Forum’s investment committee.

Prior to joining Forum, Rajeev was the CFO of Dream Global REIT, a Western European, \$6 billion office and industrial platform that was acquired in 2019 by Blackstone. Previous to his appointment at Dream Global, Rajeev was CFO for Dream Office REIT. He also serves on the board of the Greater Toronto Airports Authority. He is a CPA, CA and CFA charterholder, with a Master of Accounting and Bachelor of Mathematics from the University of Waterloo.



Kent Willmore

President & Founder
AGinvest Farmland Properties Canada

Kent has over 30 years of experience in the agricultural field. He grew up in a farm family and has been buying and operating farms for his own account since 1999. In addition to his role at AGinvest, Kent is the owner of WR Detasseling Ltd. and Willmore Farms Ltd. Kent developed WR Detasseling Ltd. into Canada’s largest contract seed corn service provider, with its customer list including DuPont Pioneer, Monsanto, Pride Seeds, Maizex Seeds, Horizon Seeds, CL Seeds, Glenn Seeds and Syngenta Canada. Kent also established Willmore Farms Ltd, a farming company that produces crops on his personal portfolio of Ontario farmland.

He holds a Bachelor of Arts in Environmental Science from the University of Waterloo, and a Bachelor of Education from the University of Windsor with an all-Canadian academic athlete designation.





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CHARITY
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Introduction Capital is pleased to support these Canadian charities that provide much-needed assistance to women and youth in crisis.

A portion of registration revenue from the 11th Canadian Alternative Investment Forum will be donated to these organizations.

CHARITY PARTNERS



The Jean Tweed Centre is a leading community-based organization that provides a safe and supportive environment for women in Ontario with substance abuse, mental health and/or gambling issues.

The Centre offers a wide range of services including residential and day programming, outpatient programming, family and trauma counselling, individualized counselling, continuing care and a fully licensed therapeutic child development centre.

www.jeantweed.com



YouthSpeak's mission is to increase the resiliency of youth facing challenges through leadership training, empowering them to share their personal stories in order to promote mental health and well-being, empathy, and hope in assemblies and workshops.

Their vision is that no child or youth should feel alone, and that those who are struggling with mental health or other challenges are connected to available support to improve their overall well-being.

www.youthspeak.ca



Unity is a national non-profit organization that helps underserved youth develop resilience through Hip Hop-based programming and provides development and employment opportunities to young emerging Hip Hop artists from across Canada.

Unity's programs also support the development of creative, entrepreneurial, and professional skills among Canadian Hip Hop artists, leading to a more diversified creative community and workforce in the cultural sector.

www.unitycharity.com



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NOTES



Interviews

with Karen Azlen



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Rosenberg Research



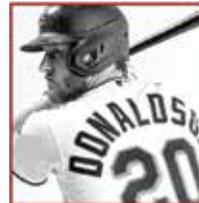
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