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THE 8TH CANADIAN ALTERNATIVE INVESTMENT FORUM

THURSDAY, APRIL 19TH, 2018

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Karen Azlen

Founder & CEO, Introduction Capital Inc.



DEAR DELEGATES,

It is with pleasure and gratitude that I welcome you to the 8th Canadian Alternative Investment Forum.

From our long standing position as a neutral industry player, Introduction Capital continues to gain more and more access to niche alternative investment ideas that we thoughtfully integrate into CAIF's agenda. We have noticed a paradigm shift, a positive uptick in momentum and enthusiasm amongst clients and colleagues this past year. This has been quite exciting and is reflected through significant interest in our conference and in the other lines of our business.

A colleague asked recently, how CAIF began and I smiled reminiscing how the state of the economy had served as a catalyst to create something new, and something needed!

Introduction Capital had produced three conferences called, "Canadian Hedge Fund Managers Speak with Investors Forum" in '06, '07 and lastly in '08. Almost every Canadian hedge fund manager from that era participated and the investors came to hear from them. I don't need to remind anyone in this room that all hell broke loose in the financial sector shortly thereafter, and so we correctly put the conference on hold.

In 2010, having weathered the financial storm, we decided to create a conference reflecting our new economy, that would include the whole range of alternative investments, well beyond just hedge funds.

I had a sense that if we created the environment for cross-pollination, everyone would collectively benefit.

Grounded in this measured intention, we have continued for eight years to produce a unique forum filled with bright ideas, meaningful connections, and a fertile environment for innovative opportunities to emerge.

With the support of a great team, our speakers and sponsors, CAIF has continually remained fresh, original and special.

In keeping with our mission, we hope that you will experience this year's conference as relevant, educational and uplifting.

We are very proud of our speaker line-up this year and grateful to all of our generous sponsors for their ongoing support. Thank you for joining us today!

Wishing you abundance in every area of your life, today and always.

With warm regards,

Karen Azlen
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Bonnefield is Canada's foremost farmland investment manager and property management firm with more than \$550 million in assets under management. Dedicated to preserving "farmland for farming", Bonnefield has received an "A" rating from the United Nations supported Principles for Responsible Investing (UN-PRI) since becoming a signatory to the organization in 2014. Bonnefield and its partnerships are 100% Canadian owned.

**equity-like
returns**

**low
volatility**

**uncorrelated with
financial markets**

**inflation
hedge**

**climate change
hedge**



Bonnefield is a signatory to the United Nations-supported Principles for Responsible Investment

8:00 am Registration and Continental Breakfast

8:30 am Welcome

Karen Azlen, Introduction Capital Inc.

8:45 am Opening Remarks

Investing Past the Seventh Inning Stretch

David Rosenberg, Gluskin Sheff & Associates Inc.

CANDID CONVERSATIONS

Each conversation will be followed by a short Q & A

9:30 am

A New Agent of Change and the Allure of Quebec Tech Disrupters

Philippe de Gaspé Beaubien III, DGC Capital

Françoise E. Lyon, DGC Capital

10:10 am

Infrastructure: an Inquiry of Real Assets and Long Lifespan Investing

Pierre Anctil, Axiom Infrastructure

Kate Roscoe, Infrastructure Equity, Manulife Capital

10:45 am Networking Break

11:05 am

In Our Own Backyard: Defining Sustainable Social Impact Investments

Dave Santangeli, Morrison Park Advisors Inc.

Alec Kodatsky, Bryfam

11:45 am

Crypto-Assets & Blockchain: Illusions and Realities Reviewed

Fred Pye, 3iQ Corp.

David Carter, 3iQ Corp.

12:20 pm Networking Lunch

1:30 pm Primary Sponsor Speaker

Tom Eisenhauer, Bonnefield

KEYNOTE ADDRESS

2:00 pm

Looking Ahead: What Are the Demographically (and Generationally) Plausible Scenarios?

Neil Howe, Hedgeye Risk Management

PANEL DISCUSSIONS

2:30 pm

The Unceasing Magnetism of Real Estate Investing

Moderator: Devon Cranson, Cranson Capital

Anthony Heller, Plazacorp Investments

Rob Goodall, CMCC Capital Fund

Rob Kumer, KingSett Capital

3:15 pm Networking Break

3:35 pm

Finding Their Place in the Sun: an Exchange with New Canadian Hedge Fund Managers

Moderator: Mackenzie Crawford, SS&C CommonWealth

Margot Naudie, IP Alpha Fund

Emil Khimji, White Crane Capital

Paul Wong, Bromma Asset Management Inc.

4:20 pm

Keeping the Entrepreneurial Spirit: the Evolution of Progressive Family Offices

Moderator: Susan Fulford, Dynamic Legacy Inc.

Michael Hyatt, Hyatt Family Office

Ron Prosserman, Augusta Holdings

Brice Scheschuk, Globalive Capital

5:05 pm Closing Remarks, Acknowledgements and Door Prizes

5:15 pm Networking Cocktail Reception

Participation in CAIF does not constitute an endorsement. Introduction Capital is an independent organization and does not endorse speakers or sponsors.

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Bonnefield is Canada's foremost farmland investment manager and property management firm with more than \$550 million in assets under management, more than any other Canadian farmland manager. The three investment partnerships currently managed by Bonnefield provide non-correlated, low-volatility, equity-like returns to investors while preserving "farmland for farming". The farmland portfolios comprise approximately 100,000 acres leased to more than 100 farm families across British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, New Brunswick and Nova Scotia. Bonnefield has received an "A" rating from the United Nations supported Principles for Responsible Investing (UN-PRI) since becoming a signatory to the organization in 2014. Bonnefield and its partnerships are 100% Canadian owned.

For more information, please visit www.bonnefield.com.

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Ardenton is a global private equity corporation, focused on meaningful business partnerships and long-term growth. Investing alongside passionate owners and management teams, Ardenton acquires controlling stakes in profitable, well-established, cash-flowing mid-market private businesses. Ardenton's niche is the underserved, lower third of the mid-tier private business market (\$3 - \$10 million EBITDA) in North America and Europe.

The Ardenton Operating System is a proprietary approach to business improvement and strategic growth which works to remove constraints for Ardenton's business partners and provides operating and financial support with a long-term view on value creation. Acquisitions are organized across a number of distinct business platforms each of which is to be developed into a stand-alone business as it achieves critical mass. Ardenton has offices in: Canada (Vancouver, Edmonton, Toronto, Guelph), U.S.A. (Dallas, Philadelphia, Chicago) and U.K. (London, Manchester) and continues to expand its global footprint.

For more information, please visit www.ardenton.com.



SS&C GlobeOp is the #1 fund administrator, delivering deep expertise and impeccable service, backed by the #1 technology-powered administrative platform. SS&C GlobeOp's expertise in business process outsourcing supports complete lifecycle capabilities, available on a stand-alone basis to hedge funds, fund of funds, private equity funds, family wealth offices, and managed accounts.

For more information, please visit www.commonwealthfundservices.com.

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Canadian Mortgage Capital Corporation ("CMCC") was founded in 1994 and is primarily engaged in non-bank lending and real estate equity investments. With seven experienced underwriters in three offices across Canada, CMCC is uniquely qualified to source high quality & geographically diversified equity investments.

CMCC has formed three (3) private real estate funds since 2011 totalling approximately \$150 million in capital and comprising 25+ project investments. CMCC closed its most recent fund, the CMCC Capital Fund, in September 2016 for \$66.35 million and is currently over 85% committed to projects, and tracking an 18.5% annualized return to investors.

CMCC's two prior funds, Dream CMCC Capital Fund I & II, closed June 2011 and June 2014, respectively. Fund I is fully repaid and achieved an overall annualized return of 22.2%, net of management fees. Fund II is fully invested, 30% repaid and estimates an annualized return to investors of 20.5%.

Our Funds have a maximum 5 year investment horizon, plus an initial 24 month period required to deploy the capital. In each Fund, CMCC (and/or its affiliates) commits its own capital of 6% - 10% of each respective Fund to provide strong alignment with our investors.

Our Fourth Fund is anticipated to begin raising equity in Q2 2018.

For more information, please visit www.cmcapitalfunds.com.



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GLOBAL INTRODUCTION SERVICES

With a focus on the global alternative investment industry since 2004, Introduction Capital precisely matches sophisticated capital with best-in-class managers and private opportunities. With a uniquely designed investor-focused model, Introduction Capital has a reputation for offering off-market and under-the-radar access. Alternative investment allocators can access the IC Marketplace (a platform of non-competing investment mandates) as well as bespoke investment searches of Introduction Capital's global network.

CANADIAN LOCAL DEALER (PLACEMENT AGENCY) SERVICES FOR GLOBAL ISSUERS

Introduction Capital is an exempt market dealer (EMD) across the key Canadian offering jurisdictions. As an EMD, Introduction Capital supports the capital raising efforts of global firms that are seeking allocations from institutional and institutional-grade investors. As their regulatory compliance partner on the ground in Canada, Introduction Capital allows global managers to easily navigate the Canadian landscape. Introduction Capital has approximately two dozen global managers as placement agency clients with assets ranging up to US\$30b primarily through referral from the firm's global alliance partners. In 2017, the firm assisted with approximately US\$250m in allocations.

CANADIAN ALTERNATIVE INVESTMENT FORUM (CAIF)

As thought leaders in the Canadian alternative investment industry, Introduction Capital produces CAIF annually to offer awareness on the current environment and vision as to what lies ahead. CAIF is a carefully curated full-day forum that introduces niche alternative opportunities, industry veterans and global trailblazers to an investing audience. CAIF is purpose-designed to connect active allocators (including ultra high net worth individuals, family offices, institutions, foundations, endowments and their advisors/counsellors) not only to their peers, but also to compelling innovators, entrepreneurs and managers.

Join our global network of sophisticated investors, managers and experts by emailing info@introcap.com.

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Toronto, Ontario, M4S 3E2 Canada



COLLABORATE LIKE A CHAMPION

Mike Lipkin

Owner and President
Environics/Lipkin

In September 2014, Tony Bennett, 89, and Lady Gaga, 31, launched their collaborative album, *Cheek to Cheek*. It was an audacious mash-up between artists from two completely different eras. *Cheek to Cheek* consists of jazz standards by popular jazz composers such as George Gershwin, Cole Porter, Jerome Kern, and Irving Berlin. The album was inspired by Bennett and Gaga's desire to introduce the music to a younger generation because they believed the songs had universal appeal.

It was an immediate hit. Debuting at number one on the US Billboard 200, it sold 131,000 albums in its first week. Bennett also set the record as the oldest man to achieve a number one album on the charts. At almost 90 years of age, Bennett drew on his legendary experience. Lady Gaga helped him make everything old new again.

By collaborating, Lady Gaga helped Tony Bennett disrupt the music industry by achieving the impossible – attract young fans to his music, while still staying true to his roots as a classic crooner. It may sound counter intuitive, but if you are a great disruptor, you are also a great collaborator. Individually, Bennett and Lady Gaga are maestros of sound. Together, they are a once-in-a-generation phenomenon.

Becoming a talent magnet: “By Invitation only”

I've discovered that success is “by invitation only.” Unless, you're still living in a feudal state, you cannot force anyone to want to work with you.

Our research indicates that there are five core criteria that measure our commercial worth:

- Am I turning my team(s) into champions?
- Am I consistently making a demonstrable difference?
- Am I extremely valuable to the people who are extremely valuable to me?
- Am I being invited to play bigger parts in bigger productions?
- Do the best people choose to partner with me?

Collaborative consumption & creation: the explosive rise of the sharing economy

Just a decade ago, it was inconceivable that you could share a stranger's apartment, car & driver, driveway, and boardroom. Or that you could crowdsource logo-design services, corporate education, concierge facilities, investment advisors, fundraising and even

insulin and pumps for diabetes. And that's just for starters. Consumers are choosing sharing over buying. It's part of the overall movement from owning things to experiencing things. Sub-par performance is instantly punished. Exceptional outcomes are rewarded with one more share.

No matter what your role, your merit is being evaluated against its collaborative consumption & creation counterparts anywhere in the world. The old mantra was "survival of the fittest." The new mantra is "Revolution through Collaboration."

The seven steps to being a champion collaborator

The best time to become a champion collaborator is now. The best steps to take are the next seven – one step at a time. If they work for you, pass them on.

1. Focus on what counts

Be clear from the start. Understand what you want to achieve through collaboration. Communicate it clearly. Help others define their compelling outcome. The main thing is to keep the main thing the main thing.

2. Design a collaborative framework

Co-create the processes and structures that expedite success. Chart your course but be prepared to course correct at any time. Build a culture that rewards collaboration and openness.

3. Build your stamina

Collaboration is intense work. You need stamina to go the extra mile. You need tenacity to hold on when others let go. You need resilience to turn setbacks into breakthroughs. Anyone can start strong. It's how you finish that counts.

4. Promote your promise

Build your personal brand as a champion collaborator. Communicate your unique value proposition. Never miss an opportunity to broadcast your benefit.

5. Use technology to amplify your impact

There's always an app for that. No matter what your industry, geniuses have created breakthrough tools to extend your reach and broaden your network. Choose your tools, then master them.

6. Create a collaborative presence

Every company wants to be a great place to work but how about the five to ten feet around you? Is it easy for others to hang with you? Is your presence a great place to be?

7. Build the strength of weak ties: develop a far-flung network

It's one thing to build your inner core. It's another thing to build your own personal world wide web that catches anyone, anywhere who can champion your cause. This is when you need to leverage the strength of your "weak ties." Your inner circle isn't going to expand your network. It's your contacts who move in different circles that build your social eminence.

In conclusion, there is an old African saying, "a person is a person because of other people." Champion collaborators are people that make other people champions by multiplying their talent and enabling their performance. Be one of them.

To find out more about how to dance with disruption, visit www.mikelipkin.com.

The opinions expressed here are those of the author and do not necessarily reflect those of Introduction Capital Inc.



Looking Ahead: What Are the Demographically (and Generationally) Plausible Scenarios?

Neil Howe

Managing Director, Demography
Hedgeye Risk Management

HEDGEYE

Neil Howe is the Demography sector head at Hedgeye Risk Management, an independent financial research firm. Howe is a renowned authority on generations and social change in America. An acclaimed bestselling author and speaker, he is the nation's leading thinker on today's generations—who they are, what motivates them, and how they will shape America's future.

A historian, economist, and demographer, Howe is also a recognized authority on global aging, long-term fiscal policy, and migration. He is currently a senior associate at the Center for Strategic and International Studies (CSIS) and the Global Aging Institute, both in Washington D.C. Howe has co-authored numerous studies for CSIS (including the Aging Vulnerability Index and pioneering studies on pension reform in China and South Korea).

Howe has written over a dozen books on generations, demographic change, and fiscal policy, many of them with William Strauss. Howe and Strauss' first book, *Generations* (1991), is a history of America told as a sequence of generational biographies.

Vice President Al Gore called it “the most stimulating book on American history that I have ever read” and sent a copy to every member of Congress. Newt Gingrich called it “an intellectual tour de force.” Of their book *The Fourth Turning* (1997), The Boston Globe wrote, “If Howe and Strauss are right, they will take their place among the great American prophets.”

Howe and Strauss originally coined the term “Millennial Generation” in 1991, and wrote the pioneering book on this generation, *Millennials Rising* (2000). His work has been featured frequently by media outlets including The Washington Post, The New York Times, CNN, and CBS' 60 Minutes.

Previous works include *On Borrowed Time* (1989; reissued 2004), a pioneering call for budgetary reform Howe co-authored with Peter G. Peterson, as well as *The Graying of the Great Powers* (2008) with Richard Jackson.

Howe received his B.A. at U.C. Berkeley and later earned graduate degrees in economics and history from Yale University.

HEDGEYE

Hedgeye Risk Management is an independent investment research and online financial media company, focused exclusively on generating and delivering thoughtful investment ideas in a proven buy-side process. Our world-class research team is committed to delivering the highest caliber investment ideas through rigorous quantitative, bottom-up and macro analysis with an emphasis on timing.



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Pierre Anctil

President & Chief Executive Officer, Axiom Infrastructure



Pierre Anctil has more than 30 years of experience in public and private sectors and as an executive in infrastructure investment and engineering.

As co-founder and CEO of Axiom Infrastructure, Pierre leads a team that has invested over a period of 8 years more than 2.5 billion Canadian dollars in a diversified portfolio of high-quality infrastructure assets.

Pierre previously served as Executive Vice President and member of the Office of the President of SNC-Lavalin Group, holding corporate responsibility for investment activities of the firm's infrastructure division, including PPP projects.

Pierre is Chairman of the Board of the Montréal Heart Institute and Member of the Board of Fondation de Polytechnique. Throughout his career, he has served as a member of various boards of directors, most notably he was a member of the Board of Directors of Gaz Métro from 2004 to 2015. He was also a member of the board of directors of the Laurentian Bank of Canada, Altalink and 407 International (where he served as Chairman of the Executive Committee until June 2008).

Pierre holds a Bachelor of Mechanical Engineering from Polytechnique Montréal, and an MBA from HEC Montréal.



David Carter

Executive Vice President, 3iQ Corp.



David is a Finance and Operations executive who excels at design and delivery of business strategy, and has broad experience in Technology solutions, Health Care and Legal Services, and Board governance. He brings a unique history of financial and forensic acumen, resource optimization, innovation, and collaborative team leadership to achieve organizational outperformance in both human capital and fiscal terms. An alumnus of Deloitte and J&J, Dave has also been a serial entrepreneur in health and technology fields.

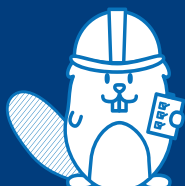
He is curious by nature, with a particular interest in emerging technologies and innovations. Since early 2016, Dave has been immersed in different blockchain ecosystems where he has networked, participated, advised and invested several times over personally in cryptocurrencies, and other crypto assets including ICOs.

David is a CPA, CA, a CFE (Certified Fraud Examiner) and a CBP (Certified Bitcoin Professional).



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Devon Cranson

President and Founder, Cranson Capital

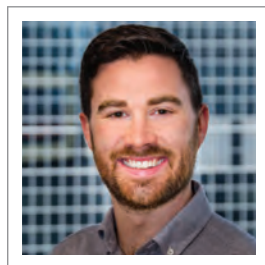


Devon Cranson is the founder and president of Cranson Capital, a boutique investment banking firm based in Toronto. Devon has deep expertise in all aspects of commercial financing, M&A and securities. Devon is a CMA, CPA and a licensed Mortgage Agent.

In 2006, Devon established Cranson Capital Solutions Inc., a corporate finance advisory firm that is focused on helping entrepreneurs with capital raising, M&A and debt advisory services.

In 2011, Devon expanded the business by establishing Cranson Capital Securities Inc., an Exempt Market Dealer focused on raising capital from accredited investors for private placements in real estate, financial services and growth companies.

Under Devon's leadership, Cranson Capital is a 5-time winner of the PCMA's Deal of the Year Award and recently ranked 49th on the Profit 500 fastest growing companies in Canada.



Mackenzie Crawford

Managing Director, SS&C Commonwealth



As Managing Director of Commonwealth Fund Services, Mackenzie was instrumental in growing the firm to its \$8 billion in assets, developing it into one of the most awarded alternative investment administrators in Canada, and leading it through its acquisition by SS&C Technologies in 2017. Mackenzie graduated from the Queen's School of Business, Honours Bachelor of Commerce.

Mackenzie is an engaged member of the investment community, speaking on panels, chairing the AIMA Canada Charity Golf Tournament, and serving on the AIMA Canada Legal and Finance Committee. Mackenzie sits on the Board of Directors of Caledon Trust Company.



Philippe de Gaspé Beaubien III

Chairman and Partner, DGC Capital



The eldest son in the family, PdBG III is a talented innovator, fascinated by business opportunities and new technologies. His career took off when he joined Telemedia, then T Investment Corp, a Canadian holding. He is also the founder of IGNIS Innovation Inc. and Redline Communications Inc., a company that sells powerful wide-area wireless networks for the most challenging locations and mission-critical applications worldwide. As an accomplished serial entrepreneur, he has been involved in 15 start-ups and turn-arounds over the past 20 years.

He understands fellow entrepreneurs, embraces technology, and is highly aware of the need for sufficient funding at the growth stage. Along with extensive global connections through his family's charitable foundation, Philippe enjoys close ties to local, provincial and federal governments in Canada. Obtaining financial and political support is one of his key strengths.

He holds an MBA from Harvard University and a Masters in Education from McGill University.



Tom Eisenhauer

President & CEO, Bonnefield



Bonnefield is Canada's largest farmland investment management and property management firm with farmland investments located in British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, New Brunswick and Nova Scotia. Tom has been President and CEO of Bonnefield since it was founded in 2009 and is responsible for the company's overall operations. He is also a member of Bonnefield's investment committee.

He has a broad range of agriculture, private equity, investment banking and merchant banking

experience. Prior to joining Bonnefield, Tom was the Managing Partner of Latitude Partners, which he co-founded in 1999. Latitude managed the Longitude Fund LP, a private equity fund that specialized in buyouts of private and public Canadian technology companies. Previously, Tom was Managing Director of TD Securities and the founder and head of TD's technology investment banking operations. He was also a managing director of Lancaster Financial, a leading independent merger and acquisition advisory firm where he was employed from 1987 until it was acquired by TD Securities in 1995.

Strength. Stability. Service.

Our Prime Brokerage team offers a comprehensive suite of client-centric services to alternative investment managers, institutional investors, and family offices. We provide our clients customized solutions relevant to their business, hands-on guidance from highly experienced professionals, and the reliability of one of the world's most stable counterparties.

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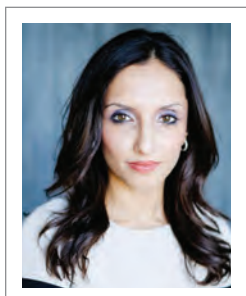
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¹ Ratings based on senior long term debt of The Toronto-Dominion Bank ("TD") as at January 31, 2018. ² Global Finance's ratings apply to the world's largest 500 banks by asset size. Global Finance calculates the rankings based on the long-term foreign currency ratings issued by Fitch Ratings, Standard & Poor's and Moody's Investors Service. ³ TD is the 6th largest bank by total assets, 5th largest bank by total deposits, and the 6th largest bank by market capitalization against North American Peers. North American Peers defined as Canadian Peers and U.S. Peers. Canadian Peers – defined as other 4 big banks (RY, BMO, BNS and CM). U.S. Peers – defined as Money Center Banks (C, BAC, JPM) and Top 3 Super-Regional Banks (WFC, PNC, USB). As of January 31, 2018 (for Canadian Peers) and December 31, 2017 (for U.S. Peers). "TD Securities" is a trade-mark of TD and is used under license by, and represents, certain investment banking and capital markets activities conducted by TD, TD Securities (USA) LLC, TD Securities Inc., TD Securities Limited and other TD affiliates. ®/ The TD logo and other trade-marks are the property of TD. (1803)

OPPORTUNISTIC INVESTING: BET ON THE ENTREPRENEUR

Amana Manori, Managing Partner & CLO, Introduction Capital Inc.



Opportunity is not a set of circumstances that allows you to do something but rather, a set of circumstances that allows you to do something favourable. That is, it is the potential for a positive outcome that makes it an opportunity versus being merely a situation.

Opportunistic investors are focused on the resulting positive outcome as posed against the risk that is required to produce that outcome. They are sourcing alpha from underperforming or untapped locations. It has been argued that alpha hunters like these are not strategic investors since they operate without defined goals – they are simply looking for sources of attractive returns. It is said that strategic investors on the other hand are allocating capital in accordance with predetermined guidelines and long-term objectives. It is suggested that this approach leads to opportunistic investors taking on greater risks with the single-minded intention of generating higher returns.

If this is the case, opportunistic investors can be more strategic by betting on entrepreneurs. Why? By definition, ‘entrepreneur’ means a business organizer that ‘takes on greater than normal financial risks’. At the outset, there is an alignment of mindset between both parties. Moreover, opportunistic investors will appreciate these five alpha boosting characteristics of real entrepreneurs:

1. Catastrophe is not paralyzing

For an entrepreneur, the worst-case scenario – even if catastrophic – is not a paralyzing idea. An honest entrepreneur can clearly admit and articulate all the potential risk factors of their endeavour and still make the business decision to pursue their idea. Brave capitalism requires a specific mental constitution of confidence, passion and optimism and we have seen many examples where it has produced remarkable results.

2. Opportunity is more important than security

You know you have found an entrepreneur when the greatest fear is not of failure but rather of missing a window of opportunity. While fuelled by ambition they are compelled by their idea. Not that security is not an

important objective, it is just that it is not the primary objective. They will not compromise the potential upside for the safety of a less rewarding opportunity.

3. Under delivering is not an option

Blame it on ego or natural confidence, but being entrepreneurial means finding solutions and delivering results. The old adage of ‘better to under promise and over deliver’ is not part of their mental landscape. The most successful businesspeople do not operate as islands. They surround themselves by solid teams and multiple resources that they can tap into to build their businesses.

4. Never one big idea

The entrepreneurial mind is full of ideas and constantly forming new ones. Whether it is for the improvement and evolution of their key endeavour or the launch of their next endeavour. If not managed correctly, this characteristic can lead to a lack of focus; honed correctly it means that the sky is the limit.

5. Blurred lines

Entrepreneurs do not draw lines between who they are and what they do. Great enterprisers have immense fluidity between their personal brands, products and organizations. Their work is not approached with a nine to five mentality. Their career defines them because that is what they are passionate about and they are always working because you never know when opportunity might come knocking.

Opportunistic investors will value true entrepreneurialism because they can relate to the emotional drivers the entrepreneurs exemplify. There is a philosophical approach to business that fearlessly looks outwards to assess what opportunity is available to take, rather than a risk-averse look inwards to consider what confines to operate under. This natural alignment between the investor and the entrepreneur will produce an attractive investment opportunity as both parties are seeking and exploiting circumstances that have the potential to produce results.

At the end of the day, identifying true entrepreneurial investment minds offers an appealing investment opportunity. It not only has the potential to yield lucrative returns but also offers a chance to support game-changing ideas and future trailblazers.

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Susan Fulford

Managing Director, Dynamic Legacy Inc.

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Susan Fulford, Managing Director of Dynamic Legacy, provides bespoke advice to business families and family offices. The successful partnership with Ivey Business School inspired us to greater purpose. The outcome – The Institute of Family Enterprise Stewards, a compelling collaboration of emotionally invested thought leaders. The Institute is founded on the collective wisdom of families, professionals who advise them and academic institutions.

Less than 1% of families successfully transition wealth or business into the 5th generation. The Institute's shameless ambition is to change that statistic.

As an experienced wealth advisor, global business executive and lawyer, Susan continues to work privately with families, while initiating the Institute. Working with 100+ Next Generations annually, families and their advisors, illuminates what is 'needed' and where 'success' is found.

Families and our economy lose if we don't change the outcomes. The Institute of Family Enterprise Stewards aspires to be a game changer. By families for families, we will identify successful alternatives leading to sustainable futures.



Robert Goodall

Founder, President and CEO, CMCC Capital Fund


CMCC
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Robert Goodall is the President and founder of Canadian Mortgage Capital Corporation ("CMCC"), a company that has two primary activities: (i) managing the operations of Atrium Mortgage Investment Corporation, a \$635 million non-bank lender which trades on the TSX, and (ii) managing various private real estate funds, totaling over \$135 million, that invest with major developers in Canada.

CMCC's head office is in downtown Toronto, and the company has 2 branch offices across Ontario and western Canada.

In its history, CMCC has arranged financing on over \$6 billion of real estate in Ontario, and funded more than \$250 million in equity investments across Canada.

From 1997-1999, CMCC also had the exclusive mandate to originate mortgages, and manage the existing mortgage portfolio of a Toronto based trust company. 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 Dream Office REIT and 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.

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Anthony Heller

President and Founder, Plazacorp Investments



Mr. Heller formed Plazacorp Investments in 1981 with the vision of developing retail commercial real estate. Plazacorp shifted to the development of residential condominiums in the 1990s and has completed or undertaken over \$3 billion in real estate development over the past 15 years representing 10,000 residential units. Mr. Heller has been involved in venture capital financing and has consulted with both privately held

and publicly traded companies in which he has invested. He has been an independent director of Firm Capital Mortgage Investment Corporation (TSE:FCU) since 1999. He has invested in and provided guidance to many successful early-stage technology companies including YAK Communications, which was founded in 1998 and sold to Globalive for \$80 million in 2006.



Michael Hyatt

Hyatt Family Office

Hyatt Family Office

Michael Hyatt is the co-founder of BlueCat, which was sold to Madison Dearborn Partners, of Chicago, IL. He serves as a director of BlueCat, ranks as one of Canada's top entrepreneurs, and is known as a technology visionary. Michael is also a weekly business commentator on CBC and was a celebrated "Dragon" on CBC's online Dragons' Den. He is an investor on the hit podcast "The Pitch" and a Founding Partner and Fellow at the Rotman School of Management's

prestigious Creative Destruction Lab. Michael sits on the CEO Board of Advisors of Georgian Partners, one of Canada's leading venture capital firms and was recently named an Entrepreneur in Residence (EIR) at Blakes, one of the most successful law firms in the country. Michael also co-founded Dyadem, a highly successful software company which was acquired by IHS (NYSE: IHS). Michael is an active investor and philanthropist who chairs the Hyatt Family Foundation.



Alec Kodatsky

Bryfam

An engineer by training, Alec entered the financial services space in 2003. Since that time, he worked as an equity research analyst covering the mining sector for both global and Canadian investment banking firms. His extensive travel to mining operations and communities around the world has given Alec an

atypical lens through which to view the importance and need for Social Impact Investing. Alec's interest in advancing Social Impact Investment initiatives continues to evolve naturally from his recent financial consulting efforts with a Toronto-based family office and Answering T.T.P. Foundation.



Emil Khimji

CEO, White Crane Capital



Emil Khimji is CEO of White Crane Capital Corp. which acts as the investment advisor to the White Crane Multi-Strategy Master Fund. The Fund is an event-driven multi-strategy hedge fund that seeks to identify undervalued securities across the capital structure with a catalyst.

Prior to co-founding White Crane Capital Corp., Mr. Khimji was part of a three person investment team that managed the PH&N Absolute Return Fund and the PH&N High Yield Bond Fund from 2007-2017.



Rob Kumer

Chief Investment Officer, KingSett Capital



Rob Kumer is Chief Investment Officer, of KingSett Capital, Canada's leading private equity real estate investment business co-investing with institutional and ultra-high net worth clients seeking to provide premium risk weighted returns through its various fund strategies.

Founded in 2002, KingSett has raised \$7.7 billion of equity for its Growth, Income, Urban and Mortgage strategies. Currently, KingSett owns interests in a \$12.5 billion portfolio of assets. KingSett continues to

seek further opportunities to invest in a wide range of real estate properties, developments, joint ventures and mortgage lending. Rob has responsibility for leading the Investments and Project Finance teams which source, underwrite and structure investment transactions for KingSett's various Fund strategies.

In addition, Rob provides oversight of KingSett's mortgage lending business and serves as Fund Manager for KingSett's Growth Funds and Urban Fund.

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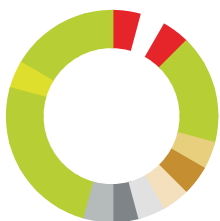
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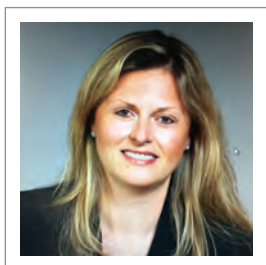
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Françoise E. Lyon

President and Co-Managing Partner, DGC Capital



Françoise is a financial sector senior executive with over 25 years of experience and a robust track record of building and managing high-performance teams and surpassing growth objectives.

Most recently, she was the Senior Vice-President of Pembroke, a private portfolio management firm in Canada, managing the company's \$1.3B private wealth division. She has built an extensive network of FO's, HNW and UHNW contacts around the world.

Over the past 20 years, Françoise has held several senior executive positions within the investment and wealth management industry, and she continues to serve on several boards, including prominent business associations serving women's interests. She brings a strong ability in strategic partnership building.

In 2013, Françoise was awarded the Queen's Diamond Jubilee Medal for her extensive work with women and wealth over the years, and two years later was identified as one of the top eight women in finance in Quebec.



Margot Naudie

Portfolio Manager, IP Alpha Fund



Margot is a seasoned Senior Portfolio Manager with over 20 years of institutional hedge fund experience managing North American and Global Natural Resource portfolios. She has invested throughout companies' capital structures, in both private and

public securities. Areas of expertise include long-only investing and long/short portfolios. Recognized as a Brendan Wood Platinum TopGun Portfolio Manager, Margot is also a CFA Charterholder and a graduate of McGill University (Hons BA) and Ivey Business School.



Ron Prosserman

President, Augusta Holdings

Raised in Montreal, Ron moved to Toronto in the early 1980's to open the retail division of his family's business, Moores – the Suit People. As President of Moores, he helped grow their company to 90+ retail stores across Canada. Upon selling the business in 1996, he became, and continues to be, president

of a private investment firm, Augusta Holding. It is a company with significant investments in real estate, private equity and marketable securities. Ron continues his compassion and commitment to the community by helping others and through his involvement in the charity world.



Ravello Precision Partners invests exclusively in public biotechnology companies. We focus on precision medicine: those technologies which will have the most profound impact on the lives of patients, healthcare systems and societies. These are primarily cell therapies, gene editing, and immunotherapies. Our team seeks to identify companies early with outstanding science, first-in-class or best-in-class drugs, led by experienced management teams.

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For further information, please contact:

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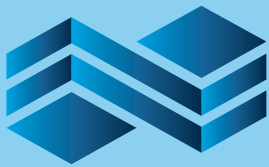
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Frederick T. Pye

President and CEO, 3iQ Corp.



Frederick T. Pye is the President, Chief Executive Officer and Chief Compliance Officer of 3iQ Corp. Mr. Pye is recognized for creating and promoting creative and unique investment products for the investment industry. Mr. Pye has managed private client portfolios with Landry Investment Management and various other investment dealers.

Prior to this, Mr. Pye was Founder, President & Chief Executive Officer of Argentum Management and Research Corporation, a company dedicated to managing and distributing quantitative investment portfolios including the first long-short mutual fund in Canada.

He was also Senior Vice-President and National Sales Manager of Fidelity Investments Canada and an integral part of the team that saw assets rise from \$80 million to over \$7.5 billion in assets under management during his tenure. He also held various positions with Guardian Trust Company, which listed the first Gold, Silver and Platinum Certificates on the Montreal Exchange.

Mr. Pye obtained a Masters in Business Administration from Concordia University and is a member of the Board of the Anglican Funds and the West Island Youth Residence.



Kate Roscoe

Managing Director, Manulife Capital



Kate Roscoe is a Managing Director at Manulife Capital responsible for investing in infrastructure assets in North America, consisting of transportation, renewable power and other infrastructure.

The portfolio is composed of funds, co-investments and direct minority equity positions to support the general account. Kate joined Manulife in 2006

and has over ten years of experience in private investments.

Kate graduated from the Richard Ivey School of Business at the University of Western Ontario and is a CFA Charterholder.

**David Rosenberg**

Chief Economist & Strategist, Gluskin Sheff + Associates Inc.



David Rosenberg is the Company's Chief Economist & Strategist with a focus on providing a top-down perspective to the Firm's investment process and Asset Mix Committee. Mr. Rosenberg received both a Bachelor of Arts and Masters of Arts degree in Economics from the University of Toronto.

Prior to joining Gluskin Sheff in the spring of 2009, Mr. Rosenberg was Chief North American Economist

at Merrill Lynch in New York for seven years, during which he was consistently ranked in the Institutional Investor All-Star analyst rankings. Prior thereto, he was Chief Economist and Strategist for Merrill Lynch Canada, based out of Toronto.

David is also the author of Breakfast with Dave, a daily distillation of his economic and financial market insights.

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Dave Santangeli

Managing Director and Co-founder, Morrison Park Advisors Inc.



Having helped establish the firm in 2004, David is involved with all aspects of MPA's business, including advising clients in M&A, capital raising and restructuring assignments. David has been advising corporate, government and not for profit clients for nearly three decades, and previously managed the Structured Finance business and Infrastructure/Power Industry Group at Scotia Capital.

A great deal of David's time at MPA is spent advising clients in the not for profit and quasi-government sectors.

In particular, MPA has been very active in the social/affordable housing space, and in the charitable and public healthcare sectors. David was the lead financial advisor to Toronto Community Housing in the financing of the Regent Park Redevelopment project, and in the initial planning for the regeneration of the Lawrence Heights neighborhood. Currently, MPA is acting as financial advisor to BC Housing, Manitoba Housing and Housing Services Corporation (Ontario) in creating a dedicated affordable housing lending institution designed to help alleviate Canada's shortage of affordable housing.



Brice Scheschuk

CEO, Globalive Capital



Brice Scheschuk, CPA, CA is CEO of Globalive Capital and CFO of Pragmatic Solutions. He was a co-founder and CFO of WIND Mobile as well as CEO of Globalive Communications. Brice has over twenty years' experience building and operating companies at Globalive, Leitch Technology and PricewaterhouseCoopers. He obtained his CA designation at PricewaterhouseCoopers and B.Comm (Hon.) Finance from Dalhousie University. Selected current and past board and advisory positions include Cranson Capital, Creative Destruction Labs –

Atlantic, Espresso Capital, Findev (CVE:FDI), Founder Institute, Globalive Communications, iLOOKABOUT (CVE:ILA), Level Jump Financial Group, Loran Scholars Foundation, OutsideIQ, Partsroom, Plaza Land Fund, Plaza Ventures, PitchPoint Solutions, Pragmatic Solutions, Ryerson Futures, Samba Days/Rewards, SceneDoc, Shamba Foundation, Techstars Toronto, Varicent Software, Web Host Industry Review, White Crane Capital, WIND Mobile, World of Angus and Zoocasa. Brice is a frequent speaker on scale-up entrepreneurship and innovation.



Paul Wong

Senior Portfolio Manager, Bromma Asset Management Inc.



Paul Wong joined BAM in 2017 with more than 20 years of experience in the investment management industry.

Prior to BAM, Paul was the lead PM for the Sprott Gold strategies (totaling approximately \$900 million) and has also managed resource-related funds at

Natcan Investment Management and TAL Global Asset Management.

Paul earned his Bachelor of Science in Geology from the University of Toronto and is a CFA Charter Holder.

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