

THE 14TH ANNUAL

PORTFOLIO+ OPEN

An unforgettable day of golf,
networking & giving back.

Tuesday, September 16, 2025

Angus Glen Golf Club

In proud support of





About The Event

LET'S MAKE A DIFFERENCE *together!*

Join us on September 16, 2025 for the 14th Annual Portfolio+ Open – a day where Canada's financial services community tees off for a great cause.

This signature charity event has raised over **\$360,000** in support of Kids Help Phone, and we're just getting started.

A PREMIER NETWORKING EVENT

PRESTIGIOUS VENUE

Play at Angus Glen, a renowned PGA venue in Ontario.

EXCITING PRIZES

Enjoy branded swag and exclusive giveaways throughout the day.

VALUABLE CONNECTIONS

Network with leaders in Canada's financial services industry.

"It's more than a golf tournament. It's where great minds meet, deals are made, and community comes first."

Angus Glen (North Course)
Tuesday, September 16, 2025

12:30
PM

BBQ Lunch & Networking

2:00
PM

Shotgun Tee-off

7:30
PM

Reception and Banquet Dinner

9:30
PM

Farewell and Departures



Agenda

Registration Options



Choose your experience:

1 Single Golfer – \$475
Includes lunch, golf, cart, beverages, reception and dinner.

2 Foursome – \$1,800
Complete package (all in option 1) for four golfers.

3 Dinner Guest – \$250
Reception and Dinner only.



Why Attend?

Support a Powerful Cause

Help raise critical funds for Kids Help Phone, Canada's 24/7 lifeline for youth mental health.

Play a Championship Course

Tee off at **Angus Glen**—a top-ranked PGA course known for its prestige and playability.

Experience the Fun Factor

Unique hole activations, contests, giveaways, and branded swag—it's golf with an extra dose of excitement.

Connect with Industry Leaders

Meet and mingle with professionals across fintech, finance, and banking in a relaxed, engaging setting.

Enjoy Premium Hospitality

From a BBQ lunch to a gourmet banquet dinner—expect top-tier food, drinks, and service all day long.

Make a Real *Impact!*

This event has raised over **\$360,000** to date—your attendance helps us drive that number even higher.

“Swing with *purpose* network, give back, and make every shot count.”

Become a Sponsor

portfolio

Share your brand. Support a cause. Build community.

Our sponsors are the heart of this event.

Your partnership helps ensure Canadian youth have access to 24/7 mental health support.

1 Dinner Sponsor

2 Lunch Sponsor

3 Beverage Cart & Halfway House Sponsor

4 Wine Sponsor

5 Prize at Every Table Sponsor

6 Cocktail Reception & Host Bar Sponsor

7 Digital Scorecard App Sponsor

8 Gelato Sponsor

9 Golf Cart Sponsor

10 Water Bottle Sponsor

11 Putting Contest Sponsor

12 Beat the Pro Sponsor

13 Individual Hole Sponsor
(18 available)

DINNER SPONSOR

\$8,500

- One foursome package
- Logo featured on Portfolio+ website, social media, signage & dinner tables
- Five-minute speaking opportunity during dinner
- Swag bag contribution opportunity
- Tax receipt available

This is your moment to shine.

Own the evening!

portfolio+

Share your brand.

Support a cause.

Build community.

Tax receipt for a portion of the cost.

LUNCH SPONSOR

\$5,800

- One foursome golf package
- Logo and name on Portfolio+ website, social media, and signage during lunch
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Start the day strong—your brand

front and centre.

COCKTAIL RECEPTION & HOST BAR SPONSOR \$3,800

- Two single-golfer packages
- Logo and name on Portfolio+ website, social media, and signage at the bar and event
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Cheers to great branding!

portfolio+

Share your
brand.

Support a
cause.

Build
community.

Tax receipt for a
portion of the cost.

BEVERAGE CART & HALFWAY HOUSE SPONSOR \$3,800

- One foursome golf package
- Logo and name on Portfolio+ website, social media, signage, beverage carts (2), and halfway house
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Fuel the Fun!

Your brand delivered
right to the fairway.

GOLF CART SPONSOR

\$2,800

- Two single-golfer packages
- Logo and name on Portfolio+ website, social media, signage, and each golf cart
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Ride along with every player
all day long.

portfolio+

Share your
brand.

Support a
cause.

Build
community.

Tax receipt for a
portion of the cost.

WATER BOTTLE SPONSOR

\$2,800

- Two single-golfer packages
- Custom branded reusable water bottles for all attendees
- Logo placement across event touchpoints
- Swag contribution & tax receipt included

Help guests stay cool and
hydrated while making your brand
part of the experience.

7

WINE SPONSOR \$1,800

- Two single-golfer packages
- Logo and name on Portfolio+ website, social media, and signage at dinner
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Let your brand shine

with every pour.

portfolio+

Share your
brand.

Support a
cause.

Build
community.

Tax receipt for a
portion of the cost.

8

GELATO SPONSOR \$2,200

- Two single-golfer packages
- Logo and name on Portfolio+ website, social media, and signage at gelato station
- Opportunity to hand out gelato at your branded tent
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Add a cool, delicious touch—and a
memorable brand moment.

PRIZE AT EVERY TABLE SPONSOR

\$1,800 if providing prizes
\$2,800 if prizes are purchased

- One foursome golf package
- Logo and name on Portfolio+ website, social media, signage on prize table and event
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Give every table a reason to smile
with your brand behind it.

portfolio+

Share your
brand.

Support a
cause.

Build
community.

Tax receipt for a
portion of the cost.

BEAT THE PRO SPONSOR \$2,000

- Two single-golfer packages
- Logo and name on Portfolio+ website, social media, signage at challenge hole and prize table
- Sponsor provides prize for the winner
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Create a competitive buzz—and
put your brand *in the spotlight.*

1

DIGITAL SCORECARD APP SPONSOR – \$1,500

- Two single-golfer packages
- Logo and name on Portfolio+ website, social media, event signage
- Logo featured on the downloadable digital scorecard app
- Opportunity to include branded swag

Be in every player's pocket
literally.

portfolio+

Share your
brand.

Support a
cause.

Build
community.

Tax receipt for a
portion of the cost.

2

PUTTING CONTEST SPONSOR

\$1,800 if providing prizes
\$3,000 if prizes are purchased

- Two single-golfer packages
- Logo and name on Portfolio+ website, social media, signage at putting green and event
- Opportunity to include branded swag

Test their skills and
highlight your brand!

INDIVIDUAL HOLE SPONSOR

\$1,100

- Logo and name on Portfolio+ website, social media, signage at sponsored hole
- Opportunity to include branded swag

Put your name on the green

one hole, all yours!

portfolio+

Share your
brand.

Support a
cause.

Build
community.

Tax receipt for a
portion of the cost.

PUTTING CONTEST SPONSOR

\$1,800 if providing prizes
\$3,000 if prizes are purchased

- Two single-golfer packages
- Logo and name on Portfolio+ website, social media, signage at putting green and event
- Opportunity to include branded swag

Test their skills and

highlight your brand!

About Portfolio+

Connecting financial institutions
with the future of fintech.

Portfolio+ empowers Canadian banks with cloud-native core banking tech and open API solutions that scale with innovation. Our platform is trusted by 5 of the 6* largest financial institutions in Canada and some of the world's most recognized banks.

From our GTA headquarters, we're redefining the financial services ecosystem—securely, intelligently, and with Canadians at heart.

*Based on TSE market capitalization figures retrieved in February 2025.





The Venue

Angus Glen Golf Club – Markham, Ontario
Home to two championship courses and former host of the PGA Tour, Angus Glen offers a premium golfing experience with stunning landscapes and top-tier service.

Walk the same fairways as the pros—and
make a difference while you do!



About The Charity

Your support helps ensure no young person faces their challenges alone.

Kids Help Phone is Canada's only 24/7, nationwide e-mental health service for youth, offering free, confidential support in multiple languages.

Since 1989, they've been a lifeline of hope for millions of kids, teens, and young adults—providing professional counselling, real-time support, and crucial mental health resources whenever and wherever they're needed.

NEED MORE INFO?



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Let's drive change, together! .

portfoli+