

THE 14<sup>TH</sup> ANNUAL

# PORTFOLIO+ OPEN

An unforgettable day of golf,  
networking & giving back.

Tuesday, September 16, 2025

Angus Glen Golf Club

In proud support of



UPDATED JUNE 10, 2025





# 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.





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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

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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 *Sold*

**2** Lunch Sponsor *Sold*

**3** Beverage Cart  
& Halfway House Sponsor *Sold*

**4** Wine Sponsor *Sold*

**5** Prize at  
Every Table  
Sponsor

**6** Cocktail  
Reception &  
Host Bar  
Sponsor *Sold*

**7** Digital  
Scorecard  
App Sponsor

**8** Gelato Sponsor *Sold*

**9** Golf Cart Sponsor *Sold*

**10** Water  
Bottle  
Sponsor *Sold*

**11** Putting  
Contest  
Sponsor *Sold*

**12** Beat the  
Pro Sponsor

**13** Individual  
Hole Sponsor  
(14 available)



# 1 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!*

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Share your brand.

Support a cause.

Build community.

Tax receipt for a portion of the cost.

# 2 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!*

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Share your  
brand.

Support a  
cause.

Build  
community.

Tax receipt for a  
portion of the cost.

## BEVERAGE CART & HALFWAY HOUSE SPONSOR \$3,800

- One for some 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.

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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

*Sold!*

Let your brand shine  
*with every pour.*

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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 event
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

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

*Sold!*



## 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.*

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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.*

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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!*



# 3 INDIVIDUAL HOLE SPONSOR

\$1,100 *14 remaining*

- Logo and name on Portfolio+ website, social media, signage at sponsored hole
- Opportunity to include branded swag
- Tax receipt for a portion of the cost

Put your name on the green  
*one hole, all yours.!*



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# 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.



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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!*

The  
Venue





# 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+**