

FIRMA Profile

The Fiduciary and Investment Risk Management Association, Inc. (FIRMA) is the leading provider of fiduciary and investment risk management education and networking to the fiduciary and investment services industries. The Association was founded in 1985 and served the industry as the National Association of Trust Audit and Compliance Professionals (NATACP). In 2001, the Association adopted its current name in order to reflect the growth of its primary mission.

The Association is a non-stock tax-exempt international membership organization dedicated to the development of risk management best practices. FIRMA offers educational conferences that bring regulatory policy makers face-to-face with the risk management professionals who advise the leaders of corporations on risk issues. FIRMA provides the forum for educational interaction among Regulators, Auditors, Consultants, Compliance Officers, Attorneys, Fiduciary and Investment Professionals, and Risk Managers. FIRMA's mission statement includes the following objectives:

- Educate, support and promote the risk management professional
- Improve the effectiveness of risk management for the fiduciary and investment industries
- Provide a forum for discussion of emerging risk issues and related regulations
- Promotion of an ethics standard for the fiduciary and investment services industries
- Provide an industry standard for the risk management professional

FIRMA offers an annual conference and six regional conferences every year. The sites for the past 6 and the next 4 annual conferences are listed below.

2001	San Antonio, TX	2006	Washington, DC (20 th Anniversary)
2002	Scottsdale, AZ	2007	Phoenix, AZ
2003	New Orleans, LA	2008	Orlando, FL
2004	Las Vegas, NV	2009	New Orleans
2005	San Diego	2010	San Francisco

Regionals: Atlanta, Chicago, Cleveland, Los Angeles, New York, St. Louis, San Antonio

FIRMA is a self-governing association that derives its success from its membership participation and the patronage of sponsoring companies. FIRMA consists of an Executive Board and functional committees, which are responsible for the administration of the FIRMA program. A continuing education program is required for certified members, and professional certification and committee participation is encouraged for all members.

Today's fiduciary and investment management environment is more complex than ever before. The demands for regulation, corporate governance, auditor independence and client privacy have elevated the risks of non-compliance. Executives who understand today's risk environment are insisting on risk management education for their risk advisors. An increasing number of these executives are turning to FIRMA for that specialized education.

FIRMA Exhibitor/Sponsorship Opportunities

Exhibit your firm's essential tool and resource solutions at our FIRMA National Training Conferences

Sponsor Exhibit Opportunity \$1,750 <ul style="list-style-type: none"> ➤ Name and Logo on conference banner, brochures & literature. ➤ Welcome acknowledgement in President's opening address ➤ One 8' skirted table & 2 chairs (based on conference facilities) ➤ electrical access outlet ➤ Includes one conference registration ➤ Includes complimentary breakfast, breaks and lunch. 	Attendee Conference Materials Spiral Bound Booklet (Exclusive) \$4,000 <ul style="list-style-type: none"> ➤ Name and logo on booklet, conference banner, brochures & literature ➤ Welcome acknowledgement in President's opening address ➤ Handouts and signage displayed at registration desk or included in attendee packages Full-Page Color Ad in Booklet \$1,000
Breaks (Morning or Afternoon) \$1,500 <ul style="list-style-type: none"> ➤ Name and Logo on conference banner, brochures, & literature. ➤ Welcome acknowledgement in President's opening address ➤ Break signage with name/logo ➤ Handouts and signage displayed at registration area 	Attendee Conference Materials File Folio (Exclusive) \$1,800 <ul style="list-style-type: none"> ➤ Name and logo on conference banner, brochure, & literature. ➤ Welcome acknowledgement in President's opening address. ➤ Handouts and signage displayed at registration desk or included in attendee packages.
Internet Café \$1,000 <ul style="list-style-type: none"> ➤ Name and Logo on conference banner, brochures, & literature. ➤ Welcome acknowledgement in President's opening address ➤ Handouts and signage displayed at Internet Café area 	ID Badge Lanyard Sponsor \$ 500 <ul style="list-style-type: none"> ➤ Name and logo on conference banner, brochures, & literature ➤ Welcome acknowledgement in President's opening address ➤ Name and logo on conference attendees' ID badge lanyards
Conference Luncheon Sponsor \$3,000 <ul style="list-style-type: none"> ➤ 1 lunch sponsorship is available (Monday) ➤ Name and Logo on conference banner, brochures, & literature. ➤ Welcome acknowledgement in President's opening address ➤ Handouts and signage displayed at registration area or during lunch. <p><i>May present industry speech (30 minutes)</i></p>	Exclusive Conference CD Sponsor \$4,000 <ul style="list-style-type: none"> ➤ Name and Logo on conference banner, brochures, & literature. ➤ Welcome acknowledgement in President's opening address ➤ Name or logo on front of CD ➤ Handouts and signage displayed at registration area or included in attendee packages.
Golf Tournament \$2,000 <ul style="list-style-type: none"> ➤ Name and logo on conference banner, brochures & literature ➤ Welcome acknowledgement in President's opening address ➤ Handouts and signage displayed at registration area 	Evening Reception Sponsor \$3,000 <ul style="list-style-type: none"> ➤ Up to 3 separate sponsors allowed ➤ Name and Logo on conference banner, brochures & literature. ➤ Welcome acknowledgement in President's opening address ➤ Signage displayed during reception and at registration area with handouts. ➤ May present a 5 minute presentation
Absentee sponsor \$ 500 <ul style="list-style-type: none"> ➤ Name and Logo on conference banner, brochures & literature. ➤ Welcome acknowledgement in President's opening address ➤ Handouts and signage displayed at registration area 	<p>Kindly contact Warner Price at (207) 828-7508 or Eileen Markenstein at (201) 707-0738; or email us at warner.price@tdbanknorth.com; or Markensteine@optonline.net for further advertising opportunities, and visit us online at www.thefirma.org.</p>

(Ask us about exclusive reception sponsorship!)

April 6-10, 2008

Hilton (in the) Walt Disney Resort
1751 Hotel Plaza Boulevard
Lake Buena Vista, FL 32830
(407) 827-4000
(800) 782-4414

Special Conference Room Rate of \$215, plus tax, per night Sunday through Thursday