



**2027 ANNUAL FIDUCIARY
RISK MANAGEMENT CONFERENCE**

**Sponsor/Exhibitor
Program and Opportunities**

**LOUISVILLE, KENTUCKY
MARCH 22-25, 2027**

WWW.THEFIRMA.ORG

Advancing Education, Enhancing Connections™



The Fiduciary and Investment Management Association, Inc. (FIRMA) is a nonprofit 501(c)(6) organization and the leading provider of fiduciary and investment risk management education. Since 1985, FIRMA has trained thousands of professionals across fiduciary services, investment management, risk, compliance, and internal audit within financial institutions the across the U.S.

In 2027, FIRMA will celebrate its **40th annual Fiduciary Risk Management Conference** at the Omni Louisville Hotel in Louisville, Kentucky. The Conference brings together experienced professionals responsible for navigating the regulatory, compliance, audit, and risk management challenges facing today's financial services industry.

For sponsors and exhibitors, this Conference provides a unique opportunity to engage directly with this specialized audience, build relationships with industry decision makers, strengthen brand visibility, and showcase products and services designed to support regulated financial institutions.

About our Conference:

- **Our Audience:**

Conference attendees are experienced professionals working across fiduciary services, investment management, risk, compliance, legal, and audit, as well as representatives from federal and state regulatory agencies.

- **Attendance:**

Approximately **300 professionals** attend the Conference in-person each year, creating an intimate environment for meaningful interaction and relationship-building.

- **Conference Experience:**

The three-and-a-half day program combines educational sessions with numerous opportunities for sponsors and exhibitors to engage with attendees throughout the Conference, including breakfasts, lunches, networking breaks, and the FIRMA Welcome Reception.

For our full conference schedule and attendee brochure, visit our website at:

<https://www.thefirma.org/conference>

Extend Your FIRMA Engagement

FIRMA offers additional opportunities to connect with our professional community throughout the year through educational programs and publications. Visit www.thefirma.org to learn more.

Partner with FIRMA and put your organization in front of the professionals shaping fiduciary, investment, risk, and compliance practices across the financial services industry.



CONNECT WITH THE **FIRMA** COMMUNITY

Put your organization in front of a highly specialized audience of fiduciary, investment, risk, compliance, audit, and regulatory professionals from financial institutions across the country.

Build Visibility



Increase awareness of your organization, products, and services among professionals responsible for managing fiduciary, investment, compliance, and risk matters.

Reach Decision-Makers



Introduce new products, services, and innovative solutions directly to experienced professionals and industry leaders who influence business and purchasing decisions.

Build Meaningful Relationships



Connect with attendees throughout the Conference in an environment designed to encourage conversation, networking, and long-term professional relationships.

Engage with the Industry



Gain valuable perspective on emerging priorities, regulatory developments, industry challenges, and the evolving needs of financial institutions

Strengthen Your Market Presence



Position your organizations alongside firms committed to supporting excellence in fiduciary and risk management.



CHOOSE YOUR 2027 FIRMA ENGAGEMENT

SELECT THE SPONSORSHIP LEVEL THAT BEST ALIGNS WITH YOUR ORGANIZATION'S VISIBILITY AND ENGAGEMENT GOALS.

Benefits	Platinum	Gold	Silver	Exhibitor
	\$8,000	\$6,500	\$4,500	\$3,500
In-Person Conference Passes*	3	2	2	1
Company Logo on FIRMA Website & Email Promotions	✓	✓	✓	✓
Company Link on FIRMA Website	✓	✓	✓	✓
Logo on Conference Walk-In/Walk-Out Screens	✓	✓	✓	✓
All sponsors will be featured on signage in the main conference foyer	✓	✓	✓	✓
Tabletop Exhibit Space (6' table + chairs)	✓	✓	✓	✓
Attendee List (Name, Title, Institution, Email):				
• One Month Prior to Conference	✓			
• Two Weeks Prior	✓	✓	✓	✓
• Post-Conference	✓	✓	✓	✓
FIRMA FORUM Magazine Advertising	Two Full-Page Ads	Two Full-Page Ads	One Full-Page Ad	
FIRMA Virtual Webinar Sponsorship	One Half-Day and Full-Day Webinar	Two 90-Minute Webinars	One 90-Minute Webinar	
<i>*Conference Passes include all sessions, materials and FIRMA-hosted events & meals</i>				
Opportunity to select one of the following (based on availability):				
• Reception Sponsor - Logo visibility and recognition during reception	✓			
• Conference Mobile App - Branding on event app	✓			
• Conference Hotel Room Key - Logo on key	✓			
• Lunch Sponsor - Logo visibility and recognition during lunch for one day		✓		
• Conference Bag Sponsor - Co-branded with Company and FIRMA logos		✓		
• Conference Notepad Sponsor- Co-branded with Company and FIRMA logos		✓		
• Break Sponsor - Logo Presence during refreshment breaks for two days		✓		

PARTNER ORGANIZATIONS with reciprocal partner agreement (contact FIRMA for further information):

Cost: Complimentary

Benefits: Exhibitor Level (see *above*)



2027 **FIRMA**™ Annual Fiduciary Risk Management Conference Sponsor/Exhibitor Registration Form

Contact Information:

Please list the name of your company's marketing contact for inclusion in attendee materials.

A one-half page company description and corporate logo are due to Amy Caple by January 22, 2027.

Contact Name: _____

Title: _____

Company Name: _____

Company Address: _____

Telephone number: _____

E-Mail Address: _____

Company Website: _____

Select One:

____ **PLATINUM** Sponsor - \$8,000

Choose sponsored amenity. Please indicate first and second choice. (subject to availability)

- ☐ Reception Sponsor
- ☐ Conference Mobile App Sponsor
- ☐ Conference Hotel Room Key Sponsor

____ **GOLD** Sponsor - \$6,500

Choose sponsored amenity. Please indicate first and second choice. (subject to availability)

- ☐ Lunch Sponsor
- ☐ Conference Bag Sponsor
- ☐ Conference Notepad Sponsor
- ☐ Break Sponsor

____ **SILVER** Sponsor - \$4,500

____ **EXHIBITOR** - \$3,500

____ **PARTNER**





Please provide the name(s) of the Sponsor representative(s) who will attend. *(Additional reps beyond what is included in your chosen Sponsor Level may attend at the regular Attendee rate of \$2,850.)*

Representative #1: (Included for all Sponsor Levels)

Full Name: _____

First Name for Name Badge: _____

Title: _____

Address: _____

Telephone number: _____

E-Mail Address: _____

Representative #2: (Included for Platinum, Gold & Silver Sponsors; Attendee rate for Exhibitors & Partners)

Full Name: _____

First Name for Name Badge: _____

Title: _____

Address: _____

Telephone number: _____

E-Mail Address: _____

Representative #3: (Included for Platinum Sponsors; Attendee rate for Gold/Silver Sponsors, Exhibitors & Partners)

Full Name: _____

First Name for Name Badge: _____

Title: _____

Address: _____

Telephone number: _____

E-Mail Address: _____

Representative #4: (Attendee rate for all Sponsor Levels)

Full Name: _____

First Name for Name Badge: _____

Title: _____

Address: _____

Telephone number: _____

E-Mail Address: _____



2027 **FIRMA**™ Annual Fiduciary Risk Management Conference Sponsor/Exhibitor Registration Form

Please return completed forms with payments to:

Amy Caple

Email: amy@thefirma.org

FIRMA Telephone: (770) 790-8355

FIRMA

P.O. Box 669515

Marietta, GA 30066

Fax: (770) 790-8363

Payment Method (choose one):

_____ Payment is enclosed (make check payable to "FIRMA")

_____ Please charge my credit card (AmEx/Visa/MC/Discover):

Card #: _____ Exp. Date: _____ / _____ CVC _____

Cardholder Name (Please Print) _____

Cardholder Signature: _____

_____ Please bill me (provide billing contact):

Name: _____

Address: _____

Telephone: _____ Email: _____

Payment is due by January 22, 2027

For sponsorship questions or further advertising opportunities kindly contact:

Amy Caple (770) 790-8355 amy@thefirma.org

Casey Tuxhorn (402) 432-2018 ctuxhorn@fnbo.com

Judy Herndon (830) 391-1504 jherndon@frostbank.com

Bruce Goldberg (917) 825-0750 bkgoldberg1@gmail.com



ORGANIZATIONS REPRESENTED AT THE FIRMA 39th ANNUAL FIDUCIARY RISK MANAGEMENT CONFERENCE - 2026

Alabama State Banking Department
 Alerus Financial, NA
 Amarillo National Bank
 American National Bank & Trust
 Argent Trust Company
 Asset Mark
 Atlantic Union Bank
 Atlantic Union Bank
 Austin Trust Company
 Bank of America
 Bank of Stockton
 Bank OZK
 Bankers Trust
 Bearmoor, LLC
 Bessemer Trust
 BMO Bank N.A.
 BNY
 BOK Financial
 Broadway Wealth Management
 Brown Advisory
 Busey Wealth Management
 Cannon Financial Institute
 Central Trust Company
 Cetera Trust Company, N.A.
 CFSI
 Charles Schwab
 CIBC
 Citizens & Northern Bank
 Citizens Bank N.A.
 Citizens Trust & Investments
 City National Bank of Florida
 Commerce Bank
 Community Financial System, Inc.
 Crowe
 Crowe LLP
 Cumberland Trust
 Day Pitney LLP
 Deloitte
 Deseret Trust Company
 Edward Jones Trust Company
 Ernst & Young LLP
 Evercore Wealth Management/Evercore Trust Company
 Fayeze Sarofim and Co.
 FDIC
 Federal Reserve Bank of Atlanta
 Federal Reserve Bank of Chicago
 Federal Reserve Bank of Philadelphia
 Federal Reserve Bank of St. Louis
 Fi-Tek
 Fifth Third Bank, N.A.

First Busey Corporation
 First Citizens Bank
 First Financial Trust
 First Foundation Bank
 First Horizon Bank
 First National Bank of Omaha
 First National Bank of PA
 Florida Trust Wealth Management
 Forge Consulting LLC
 Frost Bank
 Greenleaf Trust
 Hemenway Trust Company
 Horizon Bank
 Indiana Dept of Financial Institutions
 Insightful Consulting LLC
 Inspire Trust Company
 Integrity Trust Company
 INTRUST Bank
 Iowa Division of Banking
 Johnson Financial Group
 JPMorgan Chase
 KeyBank
 Kropschot Consulting Partners
 LPL Financial, The Private Trust Company N.A.
 M&T Bank
 Mechanics Bank
 Members Trust Company
 Morris, Nichols, Arsht & Tunnell LLP
 National Advisors Trust
 Ncontracts
 Northern Trust
 Office of the Comptroller of the Currency
 Ohio Division of Financial Institutions
 Old National
 PA Department of Banking & Securities
 Peak Trust Company
 Phoenixville Federal Bank & Trust
 Piedmont Trust Company
 Pinnacle Financial Partners
 Plante Moran
 PNC
 Protiviti
 Quad City Bank & Trust
 Raymond James
 RCB Bank
 Regions Bank
 Renasant Bank
 RMO LLP
 Rockland Trust
 RSM US LLP
 S.R. Snodgrass, P.C.

S&T Bank
 Sarofim Trust Co.
 Security Federal Bank
 Sequent (North America), LLC
 South Dakota Division of Banking
 South Dakota Trust Company a JTC Company
 Southside Bank
 State of Colorado Division of Banking
 State of MI Dept of Insurance & Financial Services
 Straight Arrow Solutions LLC
 Sunflower Bank, NA
 TD Bank
 Texas Department of Banking
 The Forge Companies
 The Glenmede Trust Company, N.A.
 The Glenview Trust Company
 The National Bank of Indianapolis
 The Oasis Group
 The Trust Company of Tennessee
 Thrivent Trust Company
 TNB Financial Services
 Tolleson Private Bank
 Towne Trust
 Trident Trust
 Trust Company of the South
 Trustmark National Bank
 U.S. Bank
 UMB Bank
 Union Bank and Trust
 United Community Bank
 US Bank
 VA Bureau of Financial Institutions
 Washington Trust Bank
 Waukesha State Bank
 Wells Fargo
 Wilmington Trust Company
 Wintrust Financial Corp.
 Wintrust Private Trust Company
 Wipfli LLP
 World Liberty Financial
 Zions Bancorporation