



FIRMA[®]
Fiduciary & Investment Risk Management Association

2026 ANNUAL FIDUCIARY RISK MANAGEMENT CONFERENCE

Sponsor/Exhibitor Program and Opportunities

LITCHFIELD PARK, ARIZONA

MAY 12-15, 2026

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 our founding in 1985, FIRMA has trained thousands of professionals in trust, investment and risk management, internal audit, and compliance roles within financial institutions the across the U.S.

The wealth management industry continues to be buffeted by global and national economic waves, resulting in unprecedeted business challenges, and our members continue to depend on FIRMA to provide high-quality training and interaction with peer business leaders. To that end, the 39th Annual Fiduciary Risk Management Conference is fast approaching! In 2026, the Conference moves to the Wigwam in Litchfield Park (Phoenix), Arizona. This exciting venue provides our business partners an excellent forum for you to meet our industry-leading risk management professionals, gain an understanding of their needs, and introduce them to your solutions.

About our Conference:

- **Attendees:**

Conference participants are experienced professionals, well-versed in regulatory frameworks. Most represent:

- Second-line functions: legal, risk, and compliance
- Third-line functions: internal audit
- Federal and state regulatory agencies

- **Conference Attendance:**

We typically host approximately 300 in-person attendees.

- **Conference Format:**

Our conference spans three and a half days, providing extensive opportunities to engage with our attendees throughout the program, whether it be in the mornings during breakfast, throughout the day during breaks between each session or over lunch, or at our evening Welcome Reception the first night! For our full conference schedule and attendee brochure, please visit our website at: <https://www.thefirma.org/conference>

Additional Opportunities: We offer an annual risk management conference and several online training opportunities every year. Please visit our Sponsorship page on our website for more information about upcoming events and sponsor opportunities outside of this program at: <https://www.thefirma.org/conference-sponsor-exhibitor-opportunities>

The wealth management industry demands well-informed professionals, and highly educated specialized teams are increasingly calling upon FIRMA to meet the challenge.

Your firm should exhibit at the FIRMA Conference for the:

-  **Opportunity for maximum exposure of your products and services to a nationally recognized fiduciary and investment management forum of senior audit, compliance, and risk management professionals**
-  **Opportunity to introduce your new products or innovative ideas and expand your name recognition to decision makers in the wealth management industry**
-  **Benefit of networking and referral opportunities with conference participants**
-  **Benefit of interaction with national and local regulators in a position to evaluate service providers of regulated entities**
-  **Opportunity to check out what the competition is doing in YOUR market**



FIRMA offers a variety of sponsorship levels to choose from, as noted below:

2026 FIRMA CONFERENCE SPONSORSHIP LEVELS

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	✓	✓	✓	✓
2026 FIRMA FORUM Magazine Advertising	Four Full-Page Ads	Two Full-Page Ads	One Full-Page Ad	
FIRMA Virtual Webinar Sponsorship	One Half-Day or Full-Day Webinar	Two 90-Minute Webinars	One 90-Minute Webinar	

*Conference Passes include meals, access to all sessions and speaker materials, and FIRMA-hosted events

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
- Conference Printing Station - Logo visibility

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

Cost: Complimentary

Benefits: Exhibitor Level (see above)



2026 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 March 11, 2026.

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
- Conference Printing Station Sponsor

SILVER Sponsor - \$4,500

EXHIBITOR - \$3,500

PARTNER

Based on the above Sponsorship levels, Platinum Sponsors receive (3) registrations; Gold and Silver Sponsors receive (2) registrations; Exhibitors and Partners receive (1) registration. Please provide the name(s) of the Sponsor representative(s) who will attend:

Representative #1:

Full Name: _____

First Name for Name Badge: _____

Title: _____

Address: _____

Telephone number: _____

E-Mail Address: _____

Representative #2:

Full Name: _____

First Name for Name Badge: _____

Title: _____

Address: _____

Telephone number: _____

E-Mail Address: _____

Representative #3: (Free for Platinum Sponsors, Attendee Rate for all other levels)

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: _____

Exhibitors may register additional Representatives at regular Conference Attendee rates.



2026 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 March 11, 2026

For sponsorship questions or further advertising opportunities kindly contact:

Amy Caple	(770) 790-8355	amy@thefirma.org
Michael Bridgeman	(919) 800-4580	mbridgeman@trustcompanyofthesouth.com
Stephen Cantrell	(530) 526-1975	stephen.cantrell@onpointcu.com
Gaby Bailey	(215) 419-6063	gabrielle.bailey@glenmede.com

ORGANIZATIONS REPRESENTED AT THE FIRMA 38th ANNUAL FIDUCIARY RISK MANAGEMENT CONFERENCE - 2025

Advocacy Trust	Fidelity	Regions Bank
Alabama State Banking Department	Fifth Third Bank, N.A.	Renasant Bank
Alerus Financial	First Citizens National Bank	Rockland Trust
Amarillo National Bank	First Foundation Bank	RSM US LLP
American Bankers Association	First Horizon Bank	S.R. Snodgrass, P.C.
Ameriserv Trust and Financial Services	First Mid Wealth Management	Sabal Trust Company
Argent Trust Company	First National Bank of Omaha	Sageworth Trust Company
Arkansas State Bank Department	First Nebraska Trust Company	Saltmarsh CPA
Atlantic Union Bank	Frost Bank	South Dakota Division of Banking
Baker Tilly Advisory Group LP	Fulton Financial Advisors	South Dakota Trust Company
Bank of America	Greenleaf Trust	SouthState Bank, NA
Bank of New York Mellon	Groom Law Group, Chartered	State of Michigan Office of Banking
Bank OZK	Hemenway Trust Company	Straight Arrow Solutions LLC
Bankers Trust Company	Hetherington Group	Tampa Bay Trust Company
BNC National Bank	Highland Associates	TCDI
BNY Mellon	Horizon Bank	TCV Trust & Wealth Management
BOKF, NA	Huntington National Bank	Teacher Retirement System of Texas
Broadway National Bank	Indiana Dept of Financial Institutions	Texas Department of Banking
Brown Advisory	Inspire Trust Company	The Glenmede Trust Company, N.A.
CA Dept of Financial Protection & Innovation	Integrity Trust Company	The Glenview Trust Company
Cannon Financial Institute, Inc.	INTRUST Bank	The Naples Trust Company
Capital Group Companies	Iowa Division of Banking	The Northern Trust Company of Delaware
Cetera Trust Company, N.A.	JPMorgan Chase	The Sanibel Captive Trust Company
CFP Board	K&L Gates	The Stephenson National Bank & Trust
Chapman and Cutler LLP	Katten Muchin Roseman, LLP	Thrivent Trust Company
Charles Schwab	Kentucky Farmers Bank	TI-TRUST, Inc.
CIBC	Kropschot Consulting Partners	TNB Financial Services
Citizens & Northern Bank	Levenfeld Pearlstein, LLC	Trident Trust
Citizens Bank, N.A.	MainStreet Advisors	Truist
Citizens Trust & Investments Corp	Mechanics Bank	Trust Company of the South
City National Bank & Trust Company of Lawton	Members Trust Company	Trustmark National Bank
City National Bank of Florida	Midland Wealth Management	U.S. Bancorp
Commerce Bank	Morgan Lewis & Bockius	UMB Bank
Community Financial System, Inc.	Moss Adams, LLP	Union Bank & Trust
Creative Planning Trust Company, LLC	National Advisors Trust	United Bankshares, Inc.
Crowe LLP	NC Office of the Commissioner of Banks	United Community Bank
Cumberland Trust	Northern Trust	United Southern Bank
Datos Insights	Northwestern Mutual	US Bank
Debevoise & Plimpton, LLC	OCC	VA Bureau of Financial Institutions
Edward Jones Trust Company	Old Point Wealth Management	Washington Trust Bank
Ernst & Young LLP	Onpoint Community Credit Union	Waukesha State Bank
Everett Advisory Partners	Palmera Consulting LLC	Wells Fargo
Extraco Banks	Peak Trust Company	Wilmington Trust
FDIC	Phoenixville Federal Bank & Trust	Wintrust Financial Corp
Federal Reserve Bank of Atlanta	Piedmont Trust Company	Wipfli LLP
Federal Reserve Bank of Chicago	PNC	Wyrick Robbins Yates & Ponton LLP
Federal Reserve Bank of Kansas City	Principal Financial Group	
Federal Reserve Bank of Philadelphia	Raymond James	
Federal Reserve Bank of St. Louis	RCB Bank	