



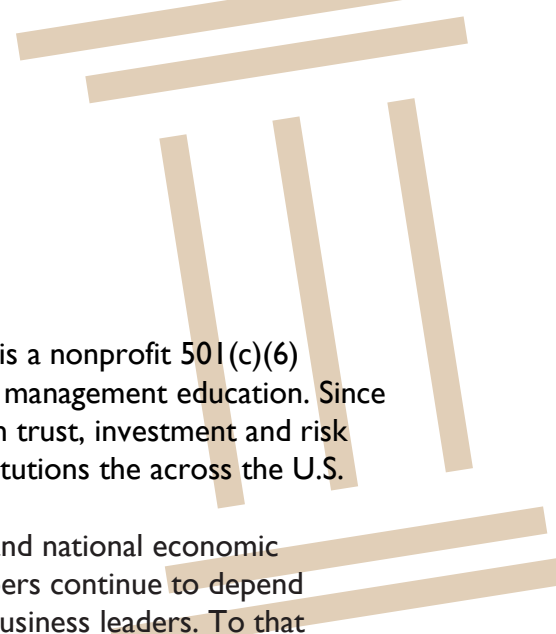

**2026 ANNUAL FIDUCIARY
RISK MANAGEMENT CONFERENCE**

**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 unprecedented 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	
<i>*Conference Passes include meals, access to all sessions and speaker materials, and FIRMA-hosted events</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		✓		
• Conference Printing Station - Logo visibility		✓		

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

Fax: (770) 790-8363

P.O. Box 669515

Marietta, GA 30066

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
 Alabama State Banking Department
 Alerus Financial
 Amarillo National Bank
 American Bankers Association
 Ameriserv Trust and Financial Services
 Argent Trust Company
 Arkansas State Bank Department
 Atlantic Union Bank
 Baker Tilly Advisory Group LP
 Bank of America
 Bank of New York Mellon
 Bank OZK
 Bankers Trust Company
 BNC National Bank
 BNY Mellon
 BOKF, NA
 Broadway National Bank
 Brown Advisory
 CA Dept of Financial Protection & Innovation
 Cannon Financial Institute, Inc.
 Capital Group Companies
 Cetera Trust Company, N.A.
 CFP Board
 Chapman and Cutler LLP
 Charles Schwab
 CIBC
 Citizens & Northern Bank
 Citizens Bank, N.A.
 Citizens Trust & Investments Corp
 City National Bank & Trust Company of Lawton
 City National Bank of Florida
 Commerce Bank
 Community Financial System, Inc.
 Creative Planning Trust Company, LLC
 Crowe LLP
 Cumberland Trust
 Datos Insights
 Debevoise & Plimpton, LLC
 Edward Jones Trust Company
 Ernst & Young LLP
 Everett Advisory Partners
 Extraco Banks
 FDIC
 Federal Reserve Bank of Atlanta
 Federal Reserve Bank of Chicago
 Federal Reserve Bank of Kansas City
 Federal Reserve Bank of Philadelphia
 Federal Reserve Bank of St. Louis

Fidelity
 Fifth Third Bank, N.A.
 First Citizens National Bank
 First Foundation Bank
 First Horizon Bank
 First Mid Wealth Management
 First National Bank of Omaha
 First Nebraska Trust Company
 Frost Bank
 Fulton Financial Advisors
 Greenleaf Trust
 Groom Law Group, Chartered
 Hemenway Trust Company
 Hetherington Group
 Highland Associates
 Horizon Bank
 Huntington National Bank
 Indiana Dept of Financial Institutions
 Inspire Trust Company
 Integrity Trust Company
 INTRUST Bank
 Iowa Division of Banking
 JPMorgan Chase
 K&L Gates
 Katten Muchin Roseman, LLP
 Kentucky Farmers Bank
 Kropschot Consulting Partners
 Levenfeld Pearlstein, LLC
 MainStreet Advisors
 Mechanics Bank
 Members Trust Company
 Midland Wealth Management
 Morgan Lewis & Bockius
 Moss Adams, LLP
 National Advisors Trust
 NC Office of the Commissioner of Banks
 Northern Trust
 Northwestern Mutual
 OCC
 Old Point Wealth Management
 Onpoint Community Credit Union
 Palmera Consulting LLC
 Peak Trust Company
 Phoenixville Federal Bank & Trust
 Piedmont Trust Company
 PNC
 Principal Financial Group
 Raymond James
 RCB Bank

Regions Bank
 Renasant Bank
 Rockland Trust
 RSM US LLP
 S.R. Snodgrass, P.C.
 Sabal Trust Company
 Sageworth Trust Company
 Saltmarsh CPA
 South Dakota Division of Banking
 South Dakota Trust Company
 SouthState Bank, NA
 State of Michigan Office of Banking
 Straight Arrow Solutions LLC
 Tampa Bay Trust Company
 TCDI
 TCV Trust & Wealth Management
 Teacher Retirement System of Texas
 Texas Department of Banking
 The Glenmede Trust Company, N.A.
 The Glenview Trust Company
 The Naples Trust Company
 The Northern Trust Company of Delaware
 The Sanibel Captive Trust Company
 The Stephenson National Bank & Trust
 Thrivent Trust Company
 TI-TRUST, Inc.
 TNB Financial Services
 Trident Trust
 Trust
 Trust Company of the South
 Trustmark National Bank
 U.S. Bancorp
 UMB Bank
 Union Bank & Trust
 United Bankshares, Inc.
 United Community Bank
 United Southern Bank
 US Bank
 VA Bureau of Financial Institutions
 Washington Trust Bank
 Waukesha State Bank
 Wells Fargo
 Wilmington Trust
 Wintrust Financial Corp
 Wipfli LLP
 Wyrick Robbins Yates & Ponton LLP