



**2024 ANNUAL FIDUCIARY  
RISK MANAGEMENT CONFERENCE**

**Sponsor/Exhibitor  
Program and Opportunities**

**NEW ORLEANS, LOUISIANA  
APRIL 29 – MAY 2, 2024**

***WWW.THEFIRMA.ORG***



***Advancing Education, Enhancing Connections™***



The Fiduciary and Investment Risk Management Association Inc., FIRMA™, is the leading provider of fiduciary and investment risk management education and networking to the global fiduciary and investment services industries.

As our industry continues to be buffeted by global and national economic waves, resulting in unprecedented business challenges, our members continue to depend on FIRMA to provide high-quality training and interaction with peer business leaders. To that end, the 37th Annual Fiduciary Risk Management Conference is fast approaching! In 2024 the Conference moves to New Orleans, Louisiana. 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.

Founded in 1985, FIRMA is dedicated to the development of risk management best practices. FIRMA offers educational conferences that serve as a forum for educational interaction among Regulators, Auditors, Consultants, Compliance Professionals, Attorneys, Fiduciary and Investment Professionals and Risk Managers.

**37th Annual FIRMA National Risk Management Conference**

*April 29 – May 2, 2024*

**New Orleans,  
Louisiana**

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://thefirma.org/pages/sponsorship>.

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



## Your firm should exhibit at **FIRMA** conferences 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 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**





## 2024 FIRMA CONFERENCE SPONSORSHIP LEVELS

Sponsorship Level	Gold	Silver	Exhibitor
Number Availability	3 slots	4 slots	Unlimited
Price	\$7,000	\$6,000	\$4,000
Free Conference Registrations	2	2	2
Additional Sponsor Attendees at \$1,500 Each	Unlimited	4	
Advance Copy of Attendee List	•	•	•
Exhibitor Table/Booth	•	•	•
Logo (In General Session Hall during Conference)	•		
Full page Ad in Quarterly FIRMA FORUM™	4 issues	2 Issues	
Plaque on table	Gold	Silver	
Recognition during Sponsor Introductions	•	•	•
<b>Exclusive Recognition (select one):</b>			
Cell Phone Charging Table	•		
Sponsor Logo on Hotel Room Key	•		
Host 1 <sup>st</sup> Time Attendee/New Member Reception	•		
Daily Breaks for 2 days with Sponsor Logo		•	
Conference Printing Station with Sponsor Logo		•	
Conference Photo Booth		•	



<b>Partner Organizations</b> With reciprocal partner agreement (Contact FIRMA for further information)
Cost: <b>Complimentary</b>
Exhibitor <b>Table/Booth Site</b>





# 2024 **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 8, 2024.

Contact Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Company Website: \_\_\_\_\_

Select One:

\_\_\_ **GOLD** Sponsor - \$7,000

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

- Cell Phone Charging Station
- Sponsor Logo on Hotel Room Key
- Host 1stTime Attendee/New Member Reception

\_\_\_ **SILVER** Sponsor - \$6,000

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

- Daily Breaks for 2 days with Sponsor Logo
- Conference Printing Station with Sponsor Logo
- Conference Photo Booth

\_\_\_ **EXHIBITOR** - \$4,000

\_\_\_ **PARTNER**



All Sponsor Levels and Exhibitors at the **FIRMA** National Conference receive two (2) registrations to the main Conference. Please provide the name(s) of the Sponsor representatives 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: \_\_\_\_\_

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**Exhibitors may register additional Representatives at regular Conference Attendee rates.**

**Representative #3: (\$1,500 for Gold/Silver Sponsors)**

Full Name: \_\_\_\_\_  
First Name for Name Badge: \_\_\_\_\_  
Title: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Telephone number: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

**Representative #4: (\$1,500 for Gold/Silver Sponsors)**

Full Name: \_\_\_\_\_  
First Name for Name Badge: \_\_\_\_\_  
Title: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Telephone number: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_



**ORGANIZATIONS REPRESENTED AT THE  
FIRMA 36th ANNUAL FIDUCIARY RISK MANAGEMENT CONFERENCE  
2023**

ALABAMA BANKING DEPARTMENT  
ALAMO COMMUNITY COLLEGE DISTRICT  
ALERUS FINANCIAL  
AMARILLO NATIONAL BANK  
AMERICAN BANK  
AMERICAN NATIONAL BANK & TRUST  
AMERISERV TRUST AND FINANCIAL SERVICES  
ARGENT FINANCIAL GROUP  
ATLANTIC UNION BANK  
BAKER TILLY US LLP  
BANK OF AMERICA  
BANK OF STOCKTON  
BNY MELLON  
BOK FINANCIAL  
BROADWAY BANK  
BROWN ADVISORY  
CANNON FINANCIAL INSTITUTE  
CHARLES SCHWAB  
CIBC  
CITIZENS & NORTHERN BANK  
CITIZENS BANK, N.A.  
CITIZENS TRUST & INVESTMENTS  
CITY NATIONAL BANK  
CITY NATIONAL BANK & TRUST COMPANY  
CITY NATIONAL BANK OF FLORIDA  
COMERICA BANK  
COMMERCE BANK  
CROWE LLP  
CUMBERLAND TRUST  
CUMBERLAND TRUST AND INVESTMENT COMPANY  
DAKOTA COMMUNITY BANK AND TRUST  
EDWARD JONES TRUST COMPANY  
FDIC  
FEDERAL RESERVE BANK OF ATLANTA  
FEDERAL RESERVE BANK OF CHICAGO  
FEDERAL RESERVE BANK OF CLEVELAND  
FIFTH THIRD BANK, N.A.  
FIRST CITIZENS BANK  
FIRST FOUNDATION BANK

FIRST NATIONAL BANK OF OMAHA  
FIRST NEBRASKA TRUST COMPANY  
FROST BANK  
FULTON FINANCIAL ADVISORS  
GREENLEAF TRUST  
HAPPY STATE BANK  
HARBOUR TRUST & INVESTMENT MANAGEMENT COMPANY  
HEMENWAY TRUST COMPANY  
HFG TRUST  
HORIZON BANK  
HTLF BANK  
INDIANA DEPT OF FINANCIAL INSTITUTIONS  
INTEGRITY TRUST COMPANY  
INTRUST BANK  
IOWA DIVISION OF BANKING  
JEFFERSON BANK  
JPMORGAN CHASE  
JTC TRUST COMPANY (DELAWARE) LTD  
KANSAS OFFICE OF THE STATE BANK COMMISSIONER  
M&M CONSULTING, LLC  
M&T BANK/WILMINGTON TRUST  
MAINSTREET ADVISORS  
MECHANICS BANK  
MIDLAND WEALTH MANAGEMENT  
NATIONAL ADVISORS TRUST COMPANY  
NC OFFICE OF THE COMMISSIONER OF BANKS  
NORTHERN TRUST  
NORTHWESTERN MUTUAL LIFE INSURANCE CO.  
OFFICE OF THE COMPTROLLER OF THE CURRENCY  
OHIO DIVISION OF FINANCIAL INSTITUTIONS  
OLD NATIONAL WEALTH MANAGEMENT  
OLD POINT TRUST  
PEAK TRUST COMPANY  
PHOENIXVILLE FEDERAL BANK & TRUST  
PNC  
RAYMOND JAMES

REGIONS BANK  
RENASANT BANK  
ROCKLAND TRUST CO.  
RSM US LLP  
S.R. SNODGRASS, P.C.  
SABAL TRUST COMPANY  
SANDY SPRING BANK  
SCOTIA WEALTH MANAGEMENT  
SECURIAN TRUST COMPANY  
SHESHUNOFF CONSULTING + SOLUTIONS  
SIMMONS BANK  
SOUTH DAKOTA DIVISION OF BANKING  
SOUTHSTATE WEALTH  
STATE OF MICHIGAN  
TCV TRUST & WEALTH MANAGEMENT  
TD BANK  
TEXAS BANK AND TRUST COMPANY  
TEXAS DEPARTMENT OF BANKING  
THE FIRST NATIONAL BANK IN SIOUX FALLS  
THE FORDHAM UNIVERSITY GRADUATE SCHOOL OF BUSINESS ADMINISTRATION  
THE GLENMEDE TRUST COMPANY, N.A.  
THE SANIBEL CAPTIVE TRUST COMPANY  
THRIVENT TRUST COMPANY  
TI-TRUST, INC.  
TMI TRUST COMPANY  
TOLLESON PRIVATE BANK  
TRUST COMPANY OF THE SOUTH  
UMB FINANCIAL CORPORATION  
UNION BANK & TRUST  
UNITED BANKSHARES, INC.  
US BANK  
VIRGINIA STATE CORPORATION COMMISSION  
WASHINGTON STATE DEPT OF FINANCIAL INSTITUTIONS  
WASHINGTON TRUST BANK  
WAUKESHA STATE BANK  
WELLS FARGO  
WINTRUST FINANCIAL CORP/THE CHICAGO TRUST COMPANY  
WOODTRUST BANK  
ZIONS BANCORPORATION