



**2025 ANNUAL FIDUCIARY
RISK MANAGEMENT CONFERENCE**

**Sponsor/Exhibitor
Program and Opportunities**

**ORLANDO, FLORIDA
APRIL 28 – MAY 1, 2025**

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 38th Annual Fiduciary Risk Management Conference is fast approaching! In 2025 the Conference moves to Orlando, Florida. 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.

38th Annual FIRMA National Risk Management Conference

April 28 – May 1, 2025

Orlando, Florida

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 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 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**



2025 FIRMA CONFERENCE SPONSORSHIP LEVELS

Sponsorship/Exhibit Level	Gold Sponsor	Silver Sponsor	Enhanced Exhibitor	Basic Exhibitor
Number Available	3	3	Unlimited	Unlimited
Price	\$7,000	\$6,000	\$4,000	\$3,000
Conference Registrations included	2	2	2	1
Additional Sponsor Attendees at \$1,500 Each	Unlimited	4	n/a	n/a
Advance Copy of Attendee List	•	•	•	•
Exhibitor Table/Booth	•	•	•	•
Logo Displayed on FIRMA website, in email marketing materials, and 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	•	•	•	•
Exclusive Recognition (select one):				
Host the Conference App Badge Game	•			
Sponsor Logo on Hotel Room Key	•			
Host 1 st Time Attendee/New Member Reception	•			
Host Daily Breaks for 2 days		•		
Host Conference Printing Station		•		

Partner Organizations

With reciprocal partner agreement (Contact FIRMA for further information)

Cost: Complimentary

Enhanced Exhibitor Table/Booth Site



2025 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 6, 2025.

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)

- Conference App Badge Game
- Sponsor Logo on Hotel Room Key
- IstTime Attendee/New Member Reception

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

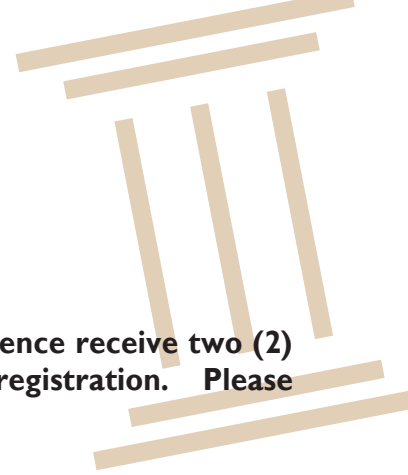
Choose sponsored amenity. Please indicate first and second choice. (subject to availability)

- Daily Breaks for 2 days (available to 2 sponsors)
- Conference Printing Station

___ **ENHANCED EXHIBITOR** - \$4,000

___ **BASIC EXHIBITOR** - \$3,000

___ **PARTNER**



All Sponsor Levels and Enhanced Exhibitors at the **FIRMA** National Conference receive two (2) registrations to the main Conference. Basic Exhibitors receive one (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: (\$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: _____

Exhibitors may register additional Representatives at regular Conference Attendee rates.



ORGANIZATIONS REPRESENTED AT THE FIRMA 37th ANNUAL FIDUCIARY RISK MANAGEMENT CONFERENCE - 2024

ALABAMA STATE BANKING
DEPARTMENT
ALERUS FINANCIAL, NA
AMARILLO NATIONAL BANK
AMERISERV TRUST & FINANCIAL
SERVICES COMPANY
ARGENT FINANCIAL GROUP
ARKANSAS STATE BANKING
DEPARTMENT
ARVEST BANK
ASSOCIATED BANK
ATLANTIC UNION BANK
BAKER TILLY US LLP
BANK OF AMERICA
BNC NATIONAL BANK
BNY MELLON
BOK FINANCIAL
BROADWAY NATIONAL BANK
BROWN ADVISORY
BUSEY WEALTH MANAGEMENT
CA DEPT OF FINANCIAL PROTECTION &
INNOVATION
CETERA TRUST COMPANY, N.A.
CHARLES SCHWAB
CHARLES W. RANSON CONSULTING
GROUP, LLC
CITIBANK
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
CROWE LLP
CUMBERLAND TRUST
CYMI HOLDINGS
DAYFORCE NATIONAL TRUST BANK
EDWARD JONES TRUST COMPANY
ERNST & YOUNG LLP
EXTRACO BANKS
FDIC

FEDERAL RESERVE BANK OF CHICAGO
FIDELITY INVESTMENTS
FIDUCIARY RISK SYSTEMS
FIFTH THIRD BANK, N.A.
FIRST CITIZENS BANK
FIRST FOUNDATION BANK
FIRST INTERSTATE BANK
FIRST MID BANK & TRUST
FIRST MID WEALTH MANAGEMENT
FIRST NATIONAL BANK OF OMAHA
FIRST NEBRASKA TRUST COMPANY
FROST BANK
GREENLEAF TRUST
HANCOCK WHITNEY BANK
HAPPY STATE BANK AND TRUST
COMPANY
HEMENWAY TRUST COMPANY
HORIZON BANK
INDIANA DEPT OF FINANCIAL
INSTITUTIONS
INTEGRITY TRUST COMPANY
INTRUST BANK
IOWA DIVISION OF BANKING
JOHNSON FINANCIAL GROUP
JPMORGAN CHASE
M&T BANK / WILMINGTON TRUST
MECHANICS BANK
MOSS ADAMS, LLP
NATIONAL ADVISORS TRUST COMPANY
NC OFFICE OF THE COMMISSIONER OF
BANKS
NCONTRACTS
NORTHERN TRUST
NORTHWESTERN MUTUAL WEALTH
MANAGEMENT COMPANY
OAKWORTH CAPITAL BANK
OFFICE OF THE COMPTROLLER OF THE
CURRENCY
OHIO DIVISION OF FINANCIAL
INSTITUTIONS
OLD NATIONAL
OLD POINT WEALTH MANAGEMENT
ONPOINT COMMUNITY CREDIT UNION

PEAK TRUST COMPANY
PHOENIXVILLE FEDERAL BANK & TRUST
PNC
RAYMOND JAMES
RCB BANK
REGIONS BANK
RENASANT BANK
ROCKLAND TRUST
RSM US
S.R. SNODGRASS, P.C.
SABAL TRUST COMPANY
SALTMARSH, CLEVELAND, AND GUND
SOUTH DAKOTA DIVISION OF BANKING
SOUTHSIDE BANK
SOUTHSTATE WEALTH
STATE OF MICHIGAN
TAMPA BAY TRUST COMPANY
TCV TRUST & WEALTH MANAGEMENT
TD BANK
TEACHER RETIREMENT SYSTEM OF TEXAS
TEXAS DEPARTMENT OF BANKING
THE CHICAGO TRUST COMPANY, N.A.
THE GLENMEDE TRUST COMPANY
THE SANIBEL CAPTIVA TRUST COMPANY
TNB FINANCIAL SERVICES
TOLLESON PRIVATE BANK
TRIDENT TRUST
TRUIST BANK
TRUST COMPANY OF THE SOUTH
UMB BANK, N.A.
UNION BANK & TRUST COMPANY
UNITED BANKSHARES, INC.
UNITED COMMUNITY BANK
US BANK
VA BUREAU OF FINANCIAL INSTITUTIONS
WA DEPARTMENT OF FINANCIAL INSTITUTIONS
WASHINGTON TRUST BANK
WELLS FARGO
WINTRUST FINANCIAL CORP
WIPFLI LLP