



# FMS REGIONAL CONFERENCE

May 27-28, 2026 | Radisson Blu Aqua Hotel, Chicago



## SPONSORSHIP OPPORTUNITIES

TO RESERVE YOUR SPONSORSHIP, PLEASE CONTACT:

**Lynn White**  
VP, Sponsorship & Exhibit Sales  
SIFMA  
212.313.1151 | [lwhite@sifma.org](mailto:lwhite@sifma.org)



May 27-28, 2026 | Radisson Blu Aqua Hotel, Chicago



## Join us as a participating sponsor today!

Sponsorship provides an opportunity for your firm to gain maximum exposure during both conferences, as well as inclusion in the event's promotional campaign. Tiered sponsorship opportunities offer benefits geared to maximize your marketing goals and objectives.

### Financial Management Society (FMS) Regional Conference

The FMS Regional Conference provides finance, regulatory and accounting professionals the opportunity to engage in key discussions with regulators - including the SEC, CFC and FINRA - and to connect with financial services industry leaders and peers.

### National Conference on the Securities Industry

The National Conference on the Securities Industry offers the latest insights from senior leadership, regulators and accounting authorities shaping industry standards. Hosted by the SIFMA Financial Management Society and AICPA & CIMA, attendees are updated on securities accounting, auditing, regulatory developments, and key economic and market trends.

**Sponsor both conferences and receive an upgraded sponsor tier status for each.  
Includes One (1) additional conference registration to each event.**

#### TO RESERVE YOUR SPONSORSHIP, PLEASE CONTACT:

Lynn White | VP, Sponsorship & Exhibit Sales | SIFMA  
212.313.1151 | [lwhite@sifma.org](mailto:lwhite@sifma.org)



May 27-28, 2026 | Radisson Blu Aqua Hotel, Chicago

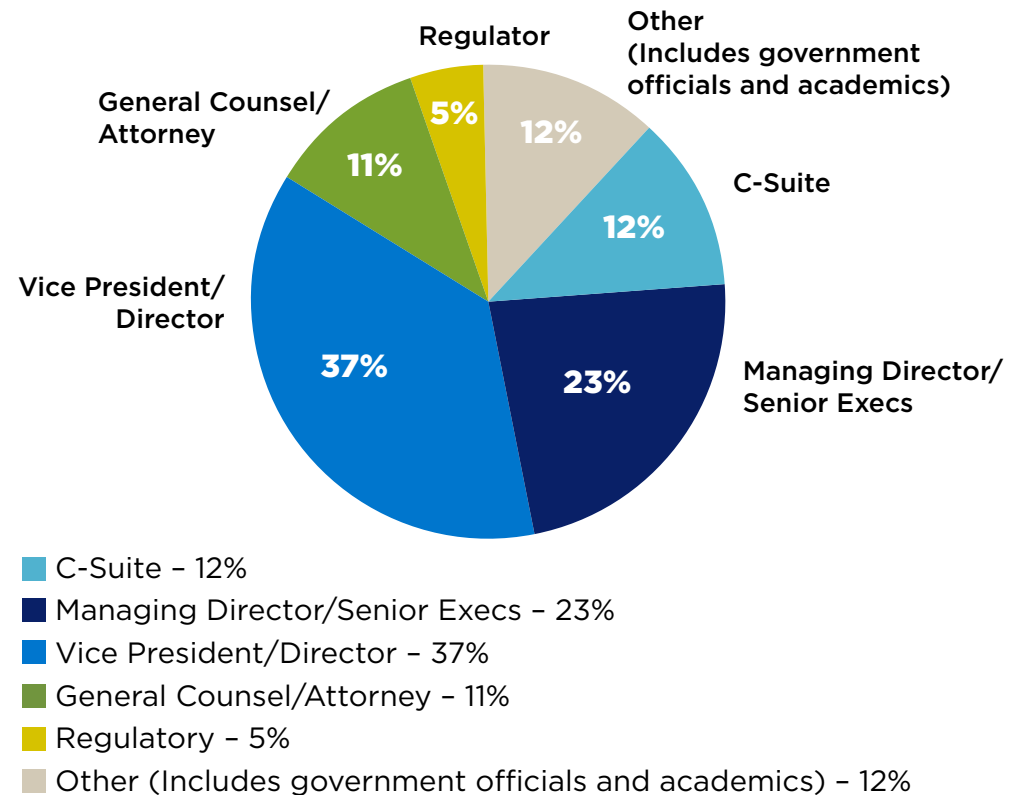
## 2026 Financial Management Society (FMS) Regional Conference Sponsorship Information

Now in its 33rd year, the FMS Regional Conference provides finance, regulatory and accounting professionals the opportunity to engage in key discussions with regulators - including the SEC, CFTC and FINRA - and to connect with financial services industry leaders and peers.

Leading financial and risk management experts will share their insights into accounting and tax updates, regulatory reporting rules and other industry developments that are crucial to your role.

Sponsorship participation will connect attendees with your firm's brand and help build relationships through face-to-face networking opportunities.

## 2025 FMS REGIONAL CONFERENCE DELEGATE PROFILE



### TO RESERVE YOUR SPONSORSHIP, PLEASE CONTACT:

Lynn White | VP, Sponsorship & Exhibit Sales | SIFMA  
212.313.1151 | [lwhite@sifma.org](mailto:lwhite@sifma.org)



May 27-28, 2026 | Radisson Blu Aqua Hotel, Chicago



## SIFMA FMS Regional Conference 2026 Sponsorship Packages offer maximum value with the following benefits:

### Pre-Conference Benefits

- Prominent placement of logo on the FMS Regional Conference website.
- Prominent placement of logo on SIFMA's marketing, which includes email campaigns highlighting dates, speaker announcements, program, etc.
- Prominent placement of logo on the "Know Before You Go" email sent to all registered participants prior to the start of the conference.
- Preliminary mailing list of conference participants (registrant name, title, firm and mailing address only). List sent four (4) weeks in advance of the FMS Regional Conference.\*

### During Conference Benefits

- Complimentary Conference Registration(s).
- Prominent brand recognition during the sponsored function (if applicable) with company logo displayed on dedicated signage strategically placed in various outlets that include registration area, general session slide deck, etc.
- Dedicated listing and firm profile placed in the Event Guide, which includes company logo, company profile and sales contact information.
- Access to networking functions.

### Post-Conference Benefits

- Sponsor logo remains on the event site until next year's FMS Regional Conference is announced, approximately 3-4 months after FMS Regional Conference 2026 takes place.
- Acknowledgment of sponsorship, with placement of logo on all post-event marketing that includes "SIFMA Thank You for Attending" and "Survey" emails.
- Final mailing list of conference participants (registrant name, title, firm, and mailing address only). List sent at the conclusion of the FMS Regional Conference.\*

\* Includes only U.S.-based participants who do not opt out during the registration process; does not include email addresses (view SIFMA's Privacy Policy at [www.sifma.org/privacy](http://www.sifma.org/privacy)).



May 27-28, 2026 | Radisson Blu Aqua Hotel, Chicago



PLATINUM	Sponsorship
<p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>• Three (3) complimentary conference registrations</li> <li>• Table Display</li> <li>• Two (2) table staff badges</li> </ul> <p><b>Investment</b></p> <p>\$10,250 SIFMA Member Rate</p> <p>\$12,250 Non-Member Rate</p>	<p><b>Welcome Reception - May 27 - SOLD</b></p> <p><i>Welcome Reception will have an open bar and circulating hors d'oeuvres, designed for a social gathering to kick off an event, allowing attendees to casually mingle, network, and get acquainted with colleagues over drinks and light bites while the event officially begins.</i></p> <hr/> <p><b>Networking Luncheon - May 27 - SOLD</b></p> <p><i>Networking Luncheon, allowing for one-on-one networking with industry colleagues. Acknowledgement on signage and firm's logo placed on slide presentation &amp; lunch menu cards placed at each seat.</i></p> <hr/> <p><b>General Session Audio Visual - SOLD</b></p> <p><i>By becoming the exclusive sponsor of the General Session Audio Visual, your company will gain significant exposure throughout the conference, including being prominently displayed on signage and integrated into the presentation slide deck with your firm's logo, ensuring maximum visibility to all attendees.</i></p>



**TO RESERVE YOUR SPONSORSHIP, PLEASE CONTACT:**

Lynn White | VP, Sponsorship & Exhibit Sales | SIFMA  
212.313.1151 | [lwhite@sifma.org](mailto:lwhite@sifma.org)



May 27-28, 2026 | Radisson Blu Aqua Hotel, Chicago



GOLD	Sponsorship
<p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>• Two (2) complimentary conference registrations</li> <li>• Table Display</li> <li>• Two (2) table staff badges</li> </ul> <p><b>Investment</b></p> <p>\$9,250 SIFMA Member Rate</p> <p>\$11,250 Non-Member Rate</p>	<p><b>Charging Station</b></p> <p><i>Branded charging station as well as individual branded charging units, which are placed near sponsor showcase, where breakfast and refreshment breaks are scheduled. Sponsoring firm's logo and video will be uploaded and displayed on digital monitor acknowledging sponsorship.</i></p> <p><b>WI-FI for Attendees</b></p> <p><i>Complimentary WI-FI usage for all FMS Regional Conference participants during conference sessions. Offering sponsoring firm an opportunity to customize the Password for access as well as acknowledgment of sponsoring firm included on a re-directed splash page, on program materials and signage.</i></p>



**TO RESERVE YOUR SPONSORSHIP, PLEASE CONTACT:**

Lynn White | VP, Sponsorship & Exhibit Sales | SIFMA  
212.313.1151 | [lwhite@sifma.org](mailto:lwhite@sifma.org)

**Benefits**

- One (1) complimentary conference registration
- Table Display
- Two (2) table staff badges

**Investment**

\$8,250 SIFMA  
Member Rate

\$10,250  
Non-Member Rate

**Networking Breakfast**

*Networking opportunity offering prominent brand recognition, a variety of healthy breakfast choices along with hot coffee and tea during one-on-one conversations with industry colleagues and potential prospects.*

MORNING	
Wednesday, May 27	THURSDAY, MAY 28
<b>SOLD</b>	

**Event Guide - SOLD**

*The attendees' go-to resource for conference information, including a program agenda, speaker bios, sponsoring firms with their company profiles and much more. The sponsorship includes your banner ad linked to a PDF or your website.*

**Co-Branded Badge Lanyard - SOLD**

*Co-branded SIFMA pre-approved badge lanyard produced by sponsoring firm. Lanyards will be distributed to event participants during registration, making them an integral part of their event experience. Sponsor's logo will be prominently featured alongside the official SIFMA logo, creating a lasting impression for all attendees.*

**Co-Branded Attendee Tote Bag - SOLD**

*A co-branded tote bag given to attendees during conference registration, with both the sponsor's logo and SIFMA's logo prominently displayed, is a highly effective way to maintain brand visibility throughout the conference and even after it concludes, as attendees will carry the bag with them, constantly exposing them to the sponsor's name and branding.*

**Branded Attendee Notepads**

*As easy effective way to get your message in the hands of registered attendees. Popular hard-covered and co-branded notepads produced and provided by the sponsoring firm will be distributed to attendees. Place your logo on the cover of the notepad and gain exposure at and beyond the seminar as attendees return to their offices and desks to jog their memories, review important notes and name of contacts.*



**May 27-28, 2026**  
**Radisson Blu Aqua Hotel,**  
**Chicago**



**TO RESERVE YOUR SPONSORSHIP, PLEASE CONTACT:**

Lynn White | VP, Sponsorship & Exhibit Sales | SIFMA  
212.313.1151 | [lwhite@sifma.org](mailto:lwhite@sifma.org)



May 27-28, 2026 | Radisson Blu Aqua Hotel, Chicago



BRONZE	Sponsorship											
<p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>• One (1) complimentary conference registration</li> <li>• Table Display</li> <li>• Two (2) table staff badges</li> </ul> <p><b>Investment</b></p> <p>\$7,750 SIFMA Member Rate</p> <p>\$9,750 Non-Member Rate</p>	<p><b>Networking Refreshment Break</b></p> <p><i>The Networking Refreshment Break designed for one-on-one industry connections, includes prominent sponsor brand recognition, and an offering of healthy snacks. This allows attendees to casually network while enjoying a revitalizing bite to eat, all while subtly reinforcing the sponsor's image through signage.</i></p> <table border="1" data-bbox="401 906 1501 1024"> <thead> <tr> <th colspan="2" data-bbox="401 906 758 946">MORNING</th> <th data-bbox="764 906 1115 946">AFTERNOON</th> </tr> <tr> <td data-bbox="401 951 758 992">Wednesday, May 27</td> <td data-bbox="764 951 1115 992">THURSDAY, MAY 28</td> <td data-bbox="1121 951 1501 992">WEDNESDAY, MAY 27</td> </tr> <tr> <td data-bbox="401 997 758 1024"></td> <td data-bbox="764 997 1115 1024"></td> <td data-bbox="1121 997 1501 1024"></td> </tr> </thead></table>			MORNING		AFTERNOON	Wednesday, May 27	THURSDAY, MAY 28	WEDNESDAY, MAY 27			
MORNING		AFTERNOON										
Wednesday, May 27	THURSDAY, MAY 28	WEDNESDAY, MAY 27										



**TO RESERVE YOUR SPONSORSHIP, PLEASE CONTACT:**

Lynn White | VP, Sponsorship & Exhibit Sales | SIFMA  
212.313.1151 | [lwhite@sifma.org](mailto:lwhite@sifma.org)



May 27-28, 2026 | Radisson Blu Aqua Hotel, Chicago



## SIFMA FMS REGIONAL CONFERENCE 2025 PARTICIPATING FIRMS

Advisors Asset Management, Inc.  
Baird  
Barclays Capital Inc.  
BDO USA, LLP  
BDT & MSD Partners, LLC  
Benjamin F. Edwards & Company, Inc.  
BMO Capital Markets Corp.  
Charles Schwab Corporation  
Citadel Securities LLC  
Cleary Gottlieb Steen & Hamilton LLP  
Crowe LLP  
D.A. Davidson & Co.  
Davenport & Company LLC  
Deloitte  
Deloitte & Touche LLP  
DTCC  
Edward D. Jones & Co., L.P.  
Edward Jones  
Ernst & Young LLP

Federal Reserve Bank of Chicago  
Federal Reserve Bank of New York  
Fidelity Investments  
Financial Industry Regulatory Authority Inc (FINRA)  
Forvis Mazars  
Goldman Sachs Custody Solutions  
Hilltop Securities Inc.  
Hudson River Trading  
IMC Financial Markets  
ING Financial Markets LLC  
Jackson National Life Insurance Company  
Janney Montgomery Scott LLC  
Jefferies LLC  
KPMG LLP  
NASDAQ  
National Futures Association (NFA)  
Navy Federal Credit Union  
Northern Trust

Northwestern Mutual  
Nuveen, LLC  
PKF O'Connor Davies, LLP  
PNC Bank  
PNC Financial Services Group, Inc.  
PwC  
R.J. O'Brien Securities, LLC  
Raymond James & Associates, Inc.  
Regnology  
RMMilburn Consulting LLC  
Robert W. Baird & Co. Incorporated  
Sia  
Solidus Labs Inc.  
Stephens Inc.  
Stifel Financial Corp.  
Stout Risius Ross, LLC  
Susquehanna International Group LLP  
The Huntington Investment Company  
TradeStation Securities, Inc.

Transamerica Financial Advisors, Inc.  
TriState Capital Bank  
U.S. Bank  
U.S. Commodity Futures Trading Commission (CFTC)  
US Securities and Exchange Commission (SEC)  
Wedbush Securities Inc.

### TO RESERVE YOUR SPONSORSHIP, PLEASE CONTACT:

Lynn White | VP, Sponsorship & Exhibit Sales | SIFMA  
212.313.1151 | [lwhite@sifma.org](mailto:lwhite@sifma.org)