



Fintech
Open Source
Foundation

Membership Benefits Guide

FINOS, the catalyst for Open Source in the Financial Service Industry



What is FINOS?



Fintech
Open Source
Foundation

The Fintech Open Source Foundation (FINOS) is an **independent, non-profit membership organization** whose purpose is to **accelerate** collaboration and **innovation in financial services** through the adoption of Open Source software, standards and best practices.

FINOS is also the financial services project of the Linux Foundation, the largest shared technology investment in the world.

Oh, and in case you're wondering, it's pronounced **fee·nowz**



What do we do, at a glance?



The Fintech Open Source Foundation (FINOS) acts as an **independent, neutral, compliant steward** for transparently governed open source, open standards and specifications **relied & collaborated upon by the financial industry at large.**



Supported by over [80 member organizations](#), we nurtured **2000+ contributors from financial institutions, big tech and fintech vendors** to mutualize resolution of **common, non-differentiating strategic challenges** in [50+ open projects](#).



FINOS also runs an [Open Source Readiness Initiative](#) to help financial firms harvest **the full business value of open source participation, in full regulatory compliance**



FINOS hosts the [Open Source in Finance Forum](#), the only **Open Source conference solely focused on financial services and regulated industries.**

Platinum



J.P.Morgan



Morgan Stanley



Value across
the value chain

100+
MEMBERS

Gold



Silver



Associate



FINOS Flagship Projects

DATA VISUALIZATION



- **Perspective** is an interactive visualization component for large, real-time datasets, used to build reports, dashboards and more, contributed by JP Morgan.



- **Waltz** allows you to visualize and define your organisation's technology landscape. Think of it like a structured Wiki for your architecture.

INTEROPERABILITY



- **FDC3** is an open standard that enables plug-and-play interoperability on the financial desktop.

DATA MODELING



- **Legend** is a data modeling platform and environment open sourced by Goldman Sachs.



- **The CDM** is a standardised, machine-readable and machine-executable blueprint for financial products and the transaction lifecycle.

OPEN REGTECH



- **LCR** is a Morgan Stanley open sourced implementation of the US Liquidity Coverage Ratio..



- **Morphir** is a multi-language system built on a data format that captures an application's domain model and business logic in a technology agnostic manner.

CLOUD AND OSS ENABLEMENT



- The **FINOS Common Cloud Controls (FINOS CCC)** is a pioneering initiative aimed at standardizing cloud deployments within the financial services sector.



Open Source
Readiness

- The **Open Source Readiness SIG** is the engine that produces industry-wide accepted best practices for financial institutions to accelerate their open source programs..

See the full FINOS
Landscape

landscape.finos.org



Contribute:
github.com/finos

FINOS Membership Benefits and Tiers

Anyone can consume, participate and contribute to FINOS projects, but, amongst many other benefits, only Members can propose new projects & sit on the Board.

How FINOS Delivers Value to its Members

FINOS members are **essential to the success of the Foundation** and are **instrumental in steering the direction** of open source in financial services. **Our Members** benefit from:

Access and network

Access the Financial Services developer and decision maker community

Standardization

Work with financial services customers **once** (in the open) instead of building customizations for every customer

OS Commoditization

Disrupt a locked-in industry through Open Source commoditization and open core models

Compliance-as-code

Collaborate with industry leaders - and increasingly with regulators - to build compliance-as-code implementations

Cut technology TCO

Mutualize cost on vast amount of non-differentiating financial services technology

Governance & Legal

Leverage FINOS governance and legal support enabling banks to safely collaborate in the open

Flexibility & Interoperability

Achieve interoperability with other vendors by driving standards and reduce concerns for vendor lock-in

Talent acquisition and retention

Lead in the open source space, enabling your developers to participate in open source projects and attracting top talent

First-mover

Position your technology as part of the reference architecture for fintech OSS. Only FINOS Members can propose new Projects.

Embrace a modern development workflow

Use and learn from the FINOS Open Developer Platform

Why we joined FINOS...

Discover

Today, we see innovation happening in the open — in robust communities like the one that has come together around FINOS. We look forward to many years of collaboration and development within the community...

BlackRock

The FDC3 standard integration is pivotal as it lays the foundation for future extensibility of the Aladdin platform and strategic integration partnerships facilitated by the FDC3-compliant message bus and adapters.

Microsoft

...we see great alignment with FINOS's initiatives, such as promoting ethical and responsible use of AI, establishing common cloud controls, and enabling interoperability through FDC3.

Publicis Sapient

[Our] long legacy of driving customer-centric digital transformation through innovation and swift delivery aligns closely with the FINOS mission to promote innovation and interoperability in financial technology.

Provectus

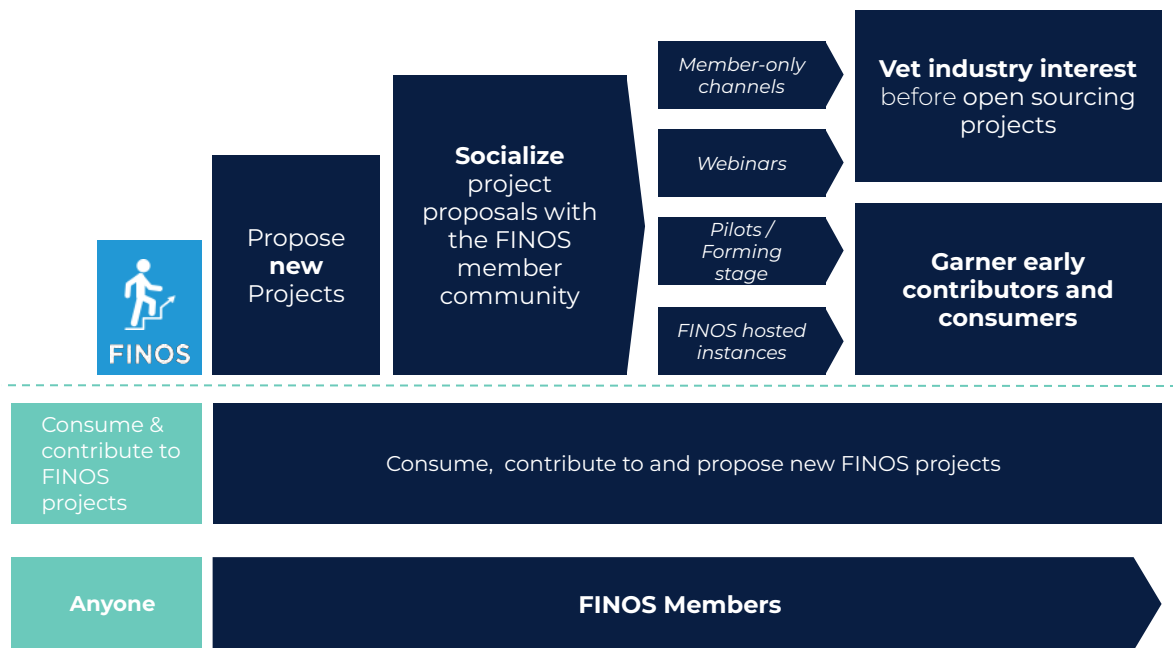
With our expertise in AI, machine learning, and data engineering, we are well-positioned to actively engage in FINOS' strategic initiatives, particularly in the responsible adoption of AI and cloud computing.

The RegTech Association

Collaborations such as these are integral to the RTA's commitment to accelerating the adoption of RegTech globally ensuring trust and transparency... Watch this space.

Member benefit zoom-in: Projects

Yes, anyone can consume and contribute to existing FINOS projects.
But **only FINOS Members can propose new projects!**



Member Success Stories

FDC3: An originally vendor led effort, turned into a global industry standard connecting buy-side and sell side, showing the value of FINOS as a neutral host for counterparts and competitors

CDM: Three trade associations (ISDA, ICMA, ISLA) choosing FINOS as a trusted neutral host to grow the adoption of CDM embracing a truly open source model

Morphir: originally contributed by Morgan Stanley, a framework with high potential now has gained traction and contributors from competing organizations

Perspective: originally contributed by JP Morgan, this high performance real-time visualization has drastically grown in contributions and adoption. There are now VC-backed startups building on this project

Member Benefits: Brand and Marketing

MEMBER BENEFITS		PLATINUM	GOLD	SILVER	NON-MEMBER
FINOS Governing Board seat	<i>Drive the overall Foundation strategy, focus with fellow executive leaders in finance and tech, elect 50% of TOC</i>	✓ (Dedicated seat)	✓ (1 seat for every 3 Members, up to a total of 5 seats for the whole class)	✓ (1 seat for the whole class)	✗
Technical Oversight Committee participation <small>(new!)</small>	<i>Influence the software project landscape by putting forward TOC candidates</i>	✓	✓	✓	Only active contributors
Brand positioning	<i>Have your company recognized as a leader in open finance and collaboration on financial technology</i>	✓ (Prime positioning on FINOS collateral and dedicated press release upon joining)	✓ (Central positioning on FINOS collateral and round up press release upon joining)	✓ (Positioning on FINOS collateral and social announcement upon joining)	✗
FINOS-led co-marketing	<i>Engage over 15k financial services technologists through our blog, webinars, podcast, newsletter and case studies.</i>	✓	✓	✓	✗
Member-led co-marketing	<i>FINOS team, Members and contributors can participate in Member co-marketing activities</i>	✓	✓	✗ (by exception)	✗

Member Benefits: Events

MEMBER BENEFITS		PLATINUM	GOLD	SILVER	NON-MEMBER
Members Meetings Open Source in Finance Forum (OSFF)	<i>Exclusive member-only events and roundtables where members explore new opportunities and existing projects</i>	✓ Free attendance (unlimited)	✓ Free attendance (7 individuals)	✓ Free attendance (3 individuals)	✗ (by invitation only)
	<i>Only industry event at the cross section of finance, open source and tech, providing unparalleled content and networking.</i>	Complimentary Access ✓ (unlimited)	Complimentary Access ✓ (7 individuals)	Complimentary Access ✓ (3 individuals)	Paid attendance
		Sponsorship Discount ✓ (15% discount)	Sponsorship Discount ✓ (15% discount)	Sponsorship Discount ✓ (15% discount)	No sponsorship discount
		Speaking Preference Preference given to speaking requests on FINOS projects	Speaking Preference Preference given to speaking requests on FINOS projects	Speaking Preference Preference given to speaking requests on FINOS projects	Submit speaking requests through standard CFS

Member Benefits: Dedicated Member services

MEMBER BENEFITS		PLATINUM	GOLD	SILVER	NON-MEMBER
Member Success	Leverage our member success team to identify opportunities and make the most of your membership	FINOS-led Member Success reviews with FINOS Executive leadership and Member Engagement Report(s)	By request Member Success review	Self-serve engagement metrics via LFX Org Dashboard	x
Project <u>formation</u> & pilot support	We help our Members successfully identify, nurture and pilot open source projects	Start a project in Member-only 'formation' stage to evaluate feasibility / desirability in a safe space	x	x	x
Propose new Projects for Incubation in FINOS (new!)	Only Members can propose projects for <u>incubation</u> in FINOS (new collaborative initiatives or existing project)	✓	✓	✓	x
Propose new FINOS Special Interest Groups (SIGs) (new!)	Only Members can propose SIGs, which explore potential solutions to key industry challenges	✓	✓	✓	x
Propose new FINOS Open Standard (new!)	Only Members can propose Open Standards, which explore potential solutions to key industry challenges	✓	✓	✓	x
Host Runtime environments of FINOS projects in our Sandbox (new!)	All contributors to FINOS projects that are affiliated with a FINOS Member can request to be included in the FINOS Project Sandbox by emailing help@finos.org	✓	✓	✓	x
FINOS Dependency Consumption Analysis (new!)	The FINOS (DCA) initiative powered by Sonatype provides a comprehensive analysis of your organization's dependency management practices	✓	✓	x	x

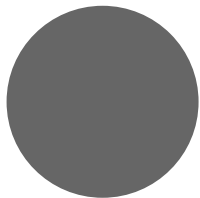
Member Benefits: Additional Benefits

MEMBER BENEFITS		PLATINUM	GOLD	SILVER	NON-MEMBER
First mover advantage	Be the first to learn about formation projects, member growth, industry initiatives & insights	✓	✓	✓	✗
<u>Zenith Brain Trust</u> (new!)	A collective of tech experts exploring emerging tech and its suitability for the industry who are responsible for the approval process of new <u>POCs</u> .	✓	✓	✓	✗
Linux Foundation Training and certifications	FINOS members enjoy premium access to LF Open Source Training and Certification	50-seat, annual subscription to eLearning courses* Enterprise wide license to the <u>OSS Best Practices</u> catalog.	50-seat, annual subscription to eLearning courses.* Volume discounts for LF training and certification based on LF tier.	Volume discounts for LF training and certification based on LF tier.	✗
FINOS Training & Certifications (new!) (Link)	FDC3 developer training, FDC3 Certified Practitioner (FCFP) and FINOS Financial Services Open Source Developer (FSOSD) Certification seats	1-year benefit* (unlimited for first 90 days, 50 seats for the remaining 275 days)**	1-year benefit* (unlimited for first 90 days, 25 seats for the remaining 275 days)**	\$299 for FDC3 training \$250 for OSR / FDC3 certification	\$299 for FDC3 training \$250 for OSR / FDC3 certification
FDC3 Agent Conformance (new!)	FINOS members can certify their container against FDC3 at no cost	✓ (Unlimited certifications)	✓ (3 certifications per year)	✓ (1 certification per year)	\$20,000 / certification

*Subject to members signing the [Linux Foundation standard Master Services Training Agreement](#)

** One-time benefit to new members of FINOS in 2024

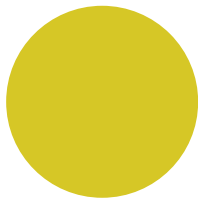
FINOS Membership Tiers



PLATINUM

\$200,000 / year

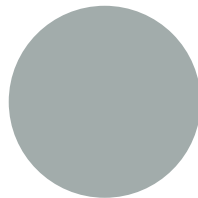
Geared towards large financial institutions; asset, wealth and fund managers; and large tech companies



GOLD

\$50,000 / year

Targeted at market data providers, large ISVs and SIs, technology partners and exchanges.

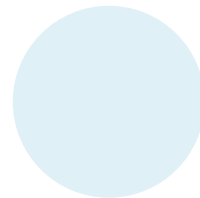


SILVER

\$10K-30,000 / year

Silver membership fees scale based on # of employees

Suitable for startups, and small consulting firms with limited resources but an appetite to contribute



ASSOCIATE

No Cost

Restricted to government organizations, regulatory bodies, nonprofits and academic institutions

Complete the [membership application](#) and we'll be in touch shortly!

FINOS Members must also become Members of the Linux Foundation (at any tier). More info [here](#).

FINOS also has an [INDIVIDUAL SUPPORTER PROGRAM](#), reserved for individuals who significantly contributed to Foundation projects, and emeriti who contributed to shaping FINOS with their thought leadership.

Linux Foundation Membership Benefits

All FINOS members must also become members of the Linux Foundation at any tier (more information [here](#)).

Some of the benefits your organization can take advantage of by being an LF member include:



LEGAL

- **Conferences.** Join exclusive legal conferences including the annual [LF Legal Summit](#), [LF Open Compliance Summit](#), legal tracks at the Open Source Leadership Summit, and access the bimonthly legal counsel calls.
- **Ad-hoc support.** Engage with our open source compliance experts for ad hoc discussions ranging from potential new projects to internal program office structures and processes.



STRATEGIC GUIDANCE

- **Best Practices.** Opportunity for your open source program office to participate in the [TODO Group \(todogroup.org\)](#) and [Open Source Security Foundation \(OpenSSF\)](#).
- **Introductions** to other Linux Foundation members and hosted projects of interest to expand business opportunities



INSIGHTS

- **Leverage** [LFX Insights](#) to validate projects for investment, and track the activity and growth of projects you're already involved in.
- **Gain visibility** on your project's code pipeline and performance metrics. Ensure the health & viability of the open source projects you care about.
- **Showcase your organization's leadership** and subject matter expertise in the open source community



EVENTS

- **Discounts** for [Linux Foundation Events](#)
- **Access** to exclusive, member-only events like the [LF member summit](#)



TRAINING

- **Discounts.** Access discounted [LF Training](#) & Certification offerings. Check out the [LF Course Catalog](#) and use the [quote tool](#) to obtain your discounts.
- **Platinum ONLY.** Enterprise wide license to [Open Source Management and Best practices curriculum](#)



MARKETING

- **Lead** sponsored webinars.
- **Participate** in articles and press releases.

For more information, see the [Linux Foundation Member Benefits](#)

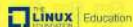
Get learning today! | <https://training.linuxfoundation.org/finos/>



Open Source Contribution in Finance

(LFD137)

ENROLL TODAY



Introduction to FDC3 (LFEL1000)

Express Learning: 90 Minutes or Less

ENROLL TODAY



Introduction to the Common Domain Model (CDM) (LFEL1016)

Express Learning: 90 Minutes or Less

ENROLL TODAY



FINOS Financial Services Open Source Developer



Developing Solutions with FDC3

(LFD237)

ENROLL TODAY



FINOS Certified FDC3 Practitioner (FCFP)



Ready to join the FINOS family?

Complete the [membership application](#) and we'll be in touch shortly.

FINOS 2025 Strategic Initiatives

On a rolling quarterly basis our Governing Board selects key areas of investment of FINOS budget and resources. This is one of the many ways our Members can influence the future direction of our Foundation.

2025 FINOS Strategic Initiatives

Each year the FINOS Governing Board and its Members identify strategic priorities across our 60+ projects: the FINOS Strategic initiatives receive focused attention from the FINOS team and dedicated funding.



AI READINESS

The newly formed **AI Readiness SIG** will provide a space to address challenges that are common to all members to develop a governance framework that manages the on-boarding, development of, and running AI-based solutions within FS organisations.

[AI Readiness Github](#)



FINOS COMMON CLOUD CONTROLS

The **FINOS Common Cloud Controls (FINOS CCC)** is a pioneering initiative aimed at standardizing cloud deployments within the financial services sector.

[CCC Homepage](#)

2025 FINOS Strategic Initiatives

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The **Common Domain Model (CDM)** is a standardized, machine-readable, and machine-executable model representing financial products, trades, and their lifecycle events.

[CDM.finos.org](https://cdm.finos.org)



FDC3 is a standardized framework developed for interoperability between financial applications. It aims to simplify communication and integration across different financial software.

[FDC3 Homepage](https://fdc3.finos.org)

2025 FINOS Strategic Initiatives

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Open RegTech

The **Open RegTech Initiative** is raising awareness on a novel approach to regulatory technology based on open source and standards, and hosting projects.

[Open RegTech Homepage](#)



OS-C fosters an open collaboration community to build a data & software precompetitive platform to dramatically boost global capital flows into climate change mitigation & resilience.

finos.org/os-climate