OPEN SOURCE IN FINANCE FORUM

2024 SPONSORSHIP PROSPECTUS

New York, NY
September 30 - October 1, 2024
New York Marriott Marquis
About Open Source in Finance Forum

September 30-October 1, 2024 | New York, NY

The Open Source in Finance Forum is a conference for experts across financial services, technology and open source to deepen collaboration and drive innovation across the industry in order to deliver better code faster.

Financial services firms make extensive use of open source, and are now starting to take full advantage of this incredible resource. By becoming strategic contributors to open source projects, companies decrease development costs, improve security, attract developers, and innovate faster. This event will showcase recent developments and the direction of open source in financial services; provide practical knowledge and guidance on best practices, tools and technologies; explore how to build a successful community; and provide unparalleled opportunities to network with the executives and individuals driving open source in financial services.

We want to give the best value possible for sponsors of OSFF, whether you are a FINOS Member or not. Your sponsorship shouldn't just be a single transaction, it should be part of an integrated plan to capture the attention of the FINOS Community not just once, but multiple times.

In all of our marketing, but especially for sponsorship of OSFF, we believe in the power of the “story arc.” We want to give sponsors and members the opportunity to connect with the FINOS Community, as well as OSFF attendees multiple times throughout the year. By the time you get to OSFF at your sponsor table, your interactions with attendees are not the climax, but actually the denouement (“the final part of a play, movie, or narrative in which the strands of the plot are drawn together and matters are explained or resolved”).

Our sponsorship levels give you the ability to be part of podcasts, blog posts, social posts, that hit the entire FINOS Ecosystem, as well as additional opportunities to participate in webinars and in-person meetups that hit specific communities and interests around open source regulation in finance, interoperability (desktop and others), open source readiness (compliance, OSPOs, etc), and then the technical projects that live in the FINOS landscape.

If you’re looking for a custom package, please reach out to us at sponsorships@linuxfoundation.org so that we can make sure the sponsorship meets your company’s goals.

Additional sponsorship opportunities:
• Open Source in Finance Forum (London) - June 2024
• FINOS Research Studies, Hackathons, Meetups, & Webinars
• FINOS Open Source in Finance Podcast
2024 Event Topics

OSS Projects & Standards
• Including opportunities in data and data management, cloud, open standards, regulation, desktop interoperability, and more.

Secure Open Source
• Secure and Collaborative Innovation using Tooling and Processes for Identifying Vulnerabilities
• How to Build a Robust Community around Software Projects to Maximize Eyeballs on Issues, as well as Solutions

Solving Industry Challenges
• Using OSS to Deliver Business and/or Tech Value to Your Organization & Consumer
• Open Source Collaboration to Tackle Pervasive Challenges or New Opportunities
• Application Interoperability including Regulatory Interpretation and Compliance, Open Data, and Leveraging Industry Standards like ISDA CDM

Delivering Business and/or Tech Value
• Specific Examples of how OSS has Delivered Business and/or Tech Value to Your Organization & Consumers in areas including Operations, Interoperability, and Commercial OSS
• Leveraging Commercial Open Source, OSS ROI, and Speed to Market (with Newest Tools)

Developing Open Source Maturity in an Organization
• Developing and Delivering Open Source Tooling, Training & Best Practices
• Addressing Open Source Legal, Compliance, and Policy Concerns
• Leveraging OSS to Attract and Retain Talent
• Upskilling and Becoming More Employable for Contributors
• The Journey through Open Source Readiness for Financial Institutions
• Innersource

Building Successful & Sustainable OSS Communities
• Tools, Advice, and Approaches for Creating Diverse and Equitable (DEI) Communities
• Building and Sustaining OSS Communities in a Highly Regulated Industry
• Attracting and Rewarding Contributors

Hot Topics for OSS in Finance
• ESG, CBDC, Blockchain, NFTs, AI, Machine Learning, Automation, Banking in the Cloud, Credit, Identity Management, Governments, and OS
Many of the world's financial services and open source technology experts have presented in previous years. Each year the lineup is a who's who of financial services, fintech, and open source industry thought leaders delivering world-class content to attendees. 2024 will undoubtedly maintain that tradition in New York.

PAST SPEAKERS

Angie Jones, Global Head of Developer Relations, TBD (a business unit of Block)
Jim Adams, CTO at Citi
Manuela Veloso, Head of AI Research, JPMorgan Chase & Co
Brian Douglas, Founder, OpenSauced
Madeleine Dassule, CIO of Infrastructure Platform Wellington Management
Ann Barron-DiCamillo, MD & Global Head of Cyber Operations, Citi
Kim Prado, CIO US Capital Markets, BMO Capital Markets
Kabir Rishi, Managing Director Global Head Data Architecture, RBC Capital Markets
Lise Noble, Director/Distinguished UX Engineer & Designer, Discover Financial Services
Milad Maleki, Senior Advisor to the Deputy Asst Secretary, U.S. Department of Treasury
## Sponsorships-at-a-Glance

Contact [sponsorships@linuxfoundation.org](mailto:sponsorships@linuxfoundation.org) to secure your sponsorship today.

### DELIVERABLES

<table>
<thead>
<tr>
<th>LEADER</th>
<th>CONTRIBUTOR</th>
<th>COMMUNITY</th>
<th>DIGITAL</th>
<th>PROJECT LEADER FULL TRACK 1.5 DAYS</th>
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### Speaking

**Speaking Opportunity:** Content must be approved by Program Committee and FINOS. Not a product pitch. Please consider D&I in speaker choices.

- 10 Minute Keynote
- 30 Minute Breakout Session
- 10 Minute Keynote
- 10 Minute Keynote

**Dedicated Talks on Your Track:** 6 or 3 talks, curated by you for your audience, branded with your foundation's logo. Based on availability. Please consider D&I in speaker choices.

- 9 Talks
- 6 Talks
- 3 Talks

### Marketing / Brand Exposure

**Logo Recognition:** Logo placement on pre-event marketing: Website, Emails and Social

- 1st Priority
- 2nd Priority
- 3rd priority
- 4th priority

**Blog Post:** Dedicated pre or post-event blog post promoting the Sponsor's involvement in OSFF & FINOS if applicable. Subject to FINOS approval; cannot include sales pitches.

- Blog post or Podcast
- Blog post or Podcast
- Blog post or Podcast
- Blog post or Podcast

**Monthly Mentions on Open Source in Finance Podcast:** Pre-event podcasts.

- 1x Dedicated
- 1x Shared
- 1x Shared
- 1x Dedicated

**Pre or Post Event Podcast Interview:** On Open Source in Finance Podcast.

- 1
- 1
- 1
- Blog post or Podcast
- Blog post or Podcast
- Blog post or Podcast

**Press Access:** Access to the event press / analyst list 1-2 weeks prior to the event plus assistance with press bookings.

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**Social Media:** From the FINOS X (formerly Twitter) & LinkedIn handles. Reposts to be approved by FINOS.

- "2 Monthly Mentions + 2 Thank You Tweets (1 day-of event and 1 post-event) + 1 Retweet Total"
- "1 Monthly Mention + 2 Thank You Tweets (1 day-of event and 1 post-event) + 1 Retweet Total"
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**Job Board:** Feature OS-related job postings.

- 3
- 2
- 1
- 1
- 3
- 2
- 1

**Access to full list of opted-in attendees:** With name, email, company name and title.

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**Additional Promotional Marketing Opportunity:** Based on availability, selected by FINOS.

- 1
- 1

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## Sponsorships-at-a-Glance

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### Email Promotion

<table>
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<tr>
<th>Pre-Event Email Blast: Dedicated, one-time use of opt-in list to be sent by FINOS. Subject to FINOS approval, cannot include sales pitches.</th>
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<tr>
<td>Dedicated Message in pre-event email linking to URL of sponsor’s choice: (Subject to FINOS approval) - 100 word max</td>
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<tr>
<td>Post-Event Email Recognition: Logo recognition in post-event attendee email communication.</td>
<td>1st Priority</td>
<td>2nd Priority</td>
<td>3rd priority</td>
<td>4th priority</td>
<td>1st Priority</td>
</tr>
</tbody>
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### On-Site Experience

| Exhibit Booth: Includes table, (2) chairs, & tabletop sign with sponsor logo. Booth placement preference based on tier, but subject to availability and timing of signing contract. | | | | | |
|---|---|---|---|---|
| Lead Retrieval App: Live scans, real time reporting and ability to take notes on captured leads. Use of lead retrieval app, no physical device provided. | 1 | 1 | 1 | | 1 | 1 | 1 |
| Recognition on Event Signage: Prominent logo display on onsite conference signage. | 1st Priority | 2nd Priority | 3rd priority | 4th priority | 1st Priority | 2nd Priority | 3rd priority |
| Keynote Stage Branding: Logo prominently displayed on keynote stage screens. | 1st Priority | 2nd Priority | 3rd priority | 4th priority | 1st Priority | 2nd Priority | 3rd priority |
| Keynote Stage Recognition: Verbal recognition during opening keynote session. | | | | | | | |
| Conference Bag Insert: Option to place marketing material or swag item in conference bags. Item subject to FINOS approval. | 2x | 1x | 1x | 1x | 2x | 2x | 1x |
| Collateral Distribution: Laid out in a prominent location near registration onsite. Collateral provided by sponsor. | 1st Priority | 2nd Priority | 3rd priority | 4th priority | 1st Priority | 2nd Priority | 3rd priority |

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<thead>
<tr>
<th>Project Leader Full Track 1.5 Days</th>
<th>Project Contributor Full Track 1 Day</th>
<th>Project Community Half Track 1 Day</th>
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<tbody>
<tr>
<td>3 AVAILABLE</td>
<td>3 AVAILABLE</td>
<td>3 AVAILABLE</td>
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### Misc.

<table>
<thead>
<tr>
<th><strong>Conference Attendee Passes</strong></th>
<th><strong>&quot;15 Members / 10 Non-Members&quot;</strong></th>
<th><strong>&quot;10 Members 8 Non-Members&quot;</strong></th>
<th><strong>&quot;8 Members 6 Non-Members&quot;</strong></th>
<th><strong>&quot;3 Members 2 Non-Members&quot;</strong></th>
<th><strong>15</strong></th>
<th><strong>10</strong></th>
<th><strong>6</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount Codes on Conference Passes</td>
<td>VIP Clients for use by your VIP clients</td>
<td>30% Off - Unlimited Use</td>
<td>20% Off - Unlimited Use</td>
<td>20% Off - Unlimited Use</td>
<td>20% Off - Unlimited Use</td>
<td>30% Off - Unlimited Use</td>
<td>30% Off - Unlimited Use</td>
</tr>
</tbody>
</table>

### Post Event

| **Custom Question(s) in Post-Event Attendee Survey:** Opportunity to add question(s) of your choice (subject to approval by FINOS), and follow up reporting with data results. | **2x** | **1x** | **x** | **x** | **2x** | **2x** | **1x** |
| **Post-Event Data Report:** Provides event demographics and additional details. | . | . | . | . | . | . | . |

### Price

<table>
<thead>
<tr>
<th><strong>Non-Member Price</strong></th>
<th><strong>$60,000</strong></th>
<th><strong>$40,000</strong></th>
<th><strong>$20,000</strong></th>
<th><strong>$10,000</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FINOS Member Sponsorship Price</strong></td>
<td><strong>$47,000</strong></td>
<td><strong>$27,000</strong></td>
<td><strong>$14,000</strong></td>
<td><strong>$7,000</strong></td>
</tr>
</tbody>
</table>

The Linux Foundation reserves the right to increase/decrease the number of available sponsorships and update deliverables based on venue restrictions.

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### Participate in all 2024 Open Source in Finance Forum Events!

**London | June 2024**

**New York | September 30 - October 1, 2024**

Interested in sponsoring both events or creating a custom sponsor package? We offer a 7% discount for sponsoring both events and are happy to work with you to create a customized package to meet your organization’s needs. Contracts for New York and London must be signed at the same time to receive the discount.
## Additional Promotional Marketing Opportunities

These enhanced marketing opportunities require a leveled sponsor package unless otherwise noted.

<table>
<thead>
<tr>
<th>Package</th>
<th>Cost</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lanyard</strong></td>
<td>$5,000</td>
<td>1 AVAILABLE</td>
</tr>
<tr>
<td><strong>Conference Bag</strong></td>
<td>$5,000</td>
<td>1 AVAILABLE</td>
</tr>
<tr>
<td><strong>Job Board</strong></td>
<td>$7,500</td>
<td>1 AVAILABLE</td>
</tr>
<tr>
<td><strong>Conference T-Shirt</strong></td>
<td>$10,000</td>
<td>1 AVAILABLE</td>
</tr>
<tr>
<td><strong>Breakfast</strong></td>
<td>$7,500</td>
<td>1 AVAILABLE</td>
</tr>
<tr>
<td><strong>Lunch</strong></td>
<td>$15,000</td>
<td>1 AVAILABLE</td>
</tr>
<tr>
<td><strong>Keynote Chair Drop</strong></td>
<td>$5,000</td>
<td>2 AVAILABLE</td>
</tr>
<tr>
<td><strong>WIRELESS ACCESS SPONSORSHIP</strong></td>
<td>$7,500</td>
<td>1 AVAILABLE</td>
</tr>
<tr>
<td><strong>VIDEO LOOP IN DIGITAL SIGNAGE</strong></td>
<td>$5,000</td>
<td>10 AVAILABLE</td>
</tr>
<tr>
<td><strong>RECHARGE STATION</strong></td>
<td>$5,000</td>
<td>3 AVAILABLE</td>
</tr>
</tbody>
</table>

Every in-person attendee at the event will wear a name badge and lanyard and your logo will appear across the lanyard. Pricing includes single color logo imprint. Full color logo imprint available at an additional cost.

Every attendee will receive a conference bag with event branding and your logo. Logo size and placement subject to bag design and FINOS approval. Logo must be single color only (no gradient colors).

Support the growth of the community with a prominently displayed Job Board for job seekers and hiring companies to connect! Benefits include:
- Prominent location in the Sponsor Showcase
- Logo on Job Board

Conference wifi network name or password will be named after sponsor, based on venue capabilities.

A thirty second video loop (no audio) on onsite digital signage.

Sponsorship includes prominent logo branding at charging station.

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**QUESTIONS?**

Contact us at sponsorships@linuxfoundation.org to secure your sponsorship package now.
Additional Promotional Marketing Opportunities (Con’t.)

These enhanced marketing opportunities require a leveled sponsor package unless otherwise noted.

**ADDITIONAL CONFERENCE BAG INSERT**
$500
In addition to the conference bag insert(s) included in your sponsorship package, include an extra item with this add-on. Item subject to FINOS approval.

**ATTENDEE COFFEE BREAKS**
$5,000 | 2 AVAILABLE
Keep onsite attendees well fueled with beverages and snacks. Benefits include:
- Prominent sponsor branding on signage
- Sponsor recognition on conference schedule
Location, layout, and menu items will be determined by FINOS.

**ATTENDEE RECEPTION + BOOTH CRAWL**
$10,000 | 2 AVAILABLE
Sponsor(s) can host this evening with branding on all food and drink stations and prominently placed signage. Attendees participating onsite will enjoy an evening reception with food, drinks, and new friends. Benefits include:
- Reception with sponsor name listed on the official conference schedule
- Exclusive branding on food and drink stations and prominently placed signage
- Logo on drink tickets (limited to 2 per attendee)
- Location, layout, and menu items will be determined by FINOS.

**SCHOLARSHIPS (UNLIMITED)**
$5,000 | 10 SCHOLARSHIPS
$10,000 | 20 SCHOLARSHIPS
Level sponsorship not required.

Showcase your organization’s support of FINOS’ scholarship program by sponsoring the Diversity Scholarship. Benefits include:
- Recognition on pre-event promotion
- Recognition during the opening keynote
- Signage onsite at the event

**VIP RECEPTION**
$25,000 | 1 AVAILABLE
Sponsor(s) can host this evening offsite with branding on all food and drink stations and prominently placed signage. VIPs / Speakers / Sponsors participating offsite will enjoy an evening reception with food, drinks, and new friends. Benefits include:
- Reception with sponsor name listed on the official conference schedule
- Exclusive branding on food and drink stations and prominently placed signage
- Logo on drink tickets (limited to 2 per attendee)
- Attendees, location, layout, and menu items will be determined by FINOS.

**TRACK SPONSOR**
$10,000
Put your company name on a track at the conference! Provides great exposure to a targeted audience. Track sponsorship includes pre-event publicity. Promotion includes logo on signage outside the track room. Based on availability with preference given to higher tiered level sponsors. 2024 tracks will be decided at a later date.
ABOUT FINOS

FINOS (The Fintech Open Source Foundation) is a nonprofit whose mission is to foster the adoption of open source, open standards, and collaborative software development practices in financial services. It is a regulatory compliant platform at the center of open source, enabling the financial services industry to develop new technology projects and standards that have a lasting impact on business operations. FINOS counts over 60 major financial institutions, fintechs, and technology consultancies as part of its membership. FINOS is also part of the Linux Foundation, the largest shared technology organization in the world. For more information, visit www.finos.org.

Learn more about membership at finos.org/members

FINOS MEMBER COMPANIES

- BMO
- Citi
- GitHub
- Goldman Sachs
- JPMorgan
- Morgan Stanley
- RBC
- UBS
- Wellington Management
- American Express
- AXA
- Capital One
- DISCOVER
- Fannie Mae
- Google Cloud
- Hedera
- Lloyd's
- MEND
- NatWest
- Red Hat
- Refinitiv
- Société Générale
- S&P Global
- Sonatype
- SYMPHONY
- Tradeweb

ABOUT THE LINUX FOUNDATION

The Linux Foundation is the world's leading home for collaboration on open source software, hardware, standards, and data. Linux Foundation projects are critical to the world's infrastructure including Linux, Kubernetes, Node.js, ONAP, Hyperledger Foundation, PyTorch, RISC-V, and more. Linux Foundation focuses on leveraging best practices and addressing the needs of contributors, users, and solution providers to create sustainable models for open collaboration. For more information, please visit us at www.linuxfoundation.org.