

PRESENTED BY



Fintech
Open Source
Foundation



OPEN SOURCE
— IN —
FINANCE FORUM

A network diagram consisting of white dots connected by thin white lines, forming a complex, interconnected web. The dots are arranged in a roughly circular pattern, with some lines extending outwards.

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 26, 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

2023 Events by the Numbers

NEW YORK

700+ Attendees & Participants

70% Financial Services Industry
Attendee Makeup

50+ Thought-Leading Speakers

200+ Organizations Represented

PAST SPEAKERS

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.



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



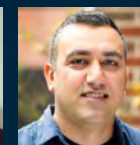
Kim Prado,
CIO US Capital
Markets, BMO
Capital Markets



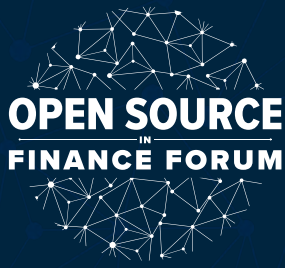
Kabir Rekhi,
Managing
Director Global
Head Data
Architecture,
RBC Capital
Markets



Lise Noble,
Director/
Distinguished
UX Engineer
& Designer,
Discover
Financial
Services



Milad Maleki,
Senior Advisor
to the Deputy
Asst Secretary,
U.S. Department
of Treasury



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2024 SPONSORSHIP PROSPECTUS

Sponsorships-at-a-Glance

Contact sponsorships@linuxfoundation.org to secure your sponsorship today.

DELIVERABLES	LEADER	CONTRIBUTOR	COMMUNITY	DIGITAL	PROJECT LEADER FULL TRACK 1.5 DAYS	PROJECT CONTRIBUTOR FULL TRACK 1 DAY	PROJECT COMMUNITY HALF TRACK 1 DAY
	4 AVAILABLE	6 AVAILABLE	8 AVAILABLE	10 AVAILABLE	3 AVAILABLE	3 AVAILABLE	3 AVAILABLE
Speaking							
Speaking Opportunity: Content must be approved by Program Committee and FINOS. Not a product pitch. Please consider D&I in speaker choices. Based on availability.	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	1st Priority	2nd Priority	3rd 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.	1	1	1	Blog post or Podcast	1	1	1
Monthly Mentions on Open Source in Finance Podcast: Pre-event podcasts.	1x Dedicated	1x Shared	1x Shared	1x Shared	1x Dedicated	1x Dedicated	1x Shared
Pre or Post Event Podcast Interview: On Open Source in Finance Podcast.	1	1	1	Blog post or Podcast	1	1	1
Press Access: Access to the event press / analyst list 1-2 weeks prior to the event plus assistance with press bookings.	•	•	•				
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	1 Monthly Mention + 2 Thank You Tweets (1 day-of event and 1 post-event)	2 Thank You Tweets (1 day-of event and 1 post-event)	2 Monthly Mentions + 2 Thank You Tweets (1 day-of event and 1 post-event) + 1 Retweet Total	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
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.	•	•			•	•	•
Additional Promotional Marketing Opportunity: Based on availability, selected by FINOS.	1				1	1	

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	LEADER	CONTRIBUTOR	COMMUNITY	DIGITAL	PROJECT LEADER FULL TRACK 1.5 DAYS	PROJECT CONTRIBUTOR FULL TRACK 1 DAY	PROJECT COMMUNITY HALF TRACK 1 DAY
DELIVERABLES	4 AVAILABLE	6 AVAILABLE	8 AVAILABLE	10 AVAILABLE	3 AVAILABLE	3 AVAILABLE	3 AVAILABLE
Email Promotion							
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.	1				1	1	
Dedicated Message in pre-event email linking to URL of sponsor's choice: (Subject to FINOS approval) - 100 word max					•	•	•
Post-Event Email Recognition: Logo recognition in post-event attendee email communication.	1st Priority	2nd Priority	3rd priority	4th priority	1st Priority	2nd Priority	3rd priority
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
CONTINUED ON NEXT PAGE							



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	LEADER	CONTRIBUTOR	COMMUNITY	DIGITAL	PROJECT LEADER FULL TRACK 1.5 DAYS	PROJECT CONTRIBUTOR FULL TRACK 1 DAY	PROJECT COMMUNITY HALF TRACK 1 DAY
DELIVERABLES	4 AVAILABLE	6 AVAILABLE	8 AVAILABLE	10 AVAILABLE	3 AVAILABLE	3 AVAILABLE	3 AVAILABLE
Misc.							
Conference Attendee Passes — Full access passes to the conference for your staff or clients.	15 Members / 10 Non-Members	10 Members 8 Non-Members	8 Members 6 Non-Members	3 Members 2 Non-Members	15	10	6
Discount Codes on Conference Passes — VIP Clients: For use by your VIP clients	30% Off - Unlimited Use	20% Off - Unlimited Use	20% Off - Unlimited Use	20% Off - Unlimited Use	30% Off - Unlimited Use	30% Off - Unlimited Use	30% Off - Unlimited Use
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			2x	2x	1x
Post-Event Data Report: Provides event demographics and additional details.	•	•	•	•	•	•	•
Non-Member Price	\$60,000	\$40,000	\$20,000	\$10,000			
FINOS Member Sponsorship Price	\$47,000	\$27,000	\$14,000	\$7,000	\$75,000	\$50,000	\$30,000

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

Participate in all 2024 Open Source in Finance Forum Events!

London | June 26, 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.



Lanyard

\$5,000 | 1 AVAILABLE

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.



Conference Bag

\$5,000 | 1 AVAILABLE

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).



Job Board

\$7,500 | 1 AVAILABLE

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 T-Shirt

\$10,000 | 1 AVAILABLE

Every in-person attendee at the event will receive an event t-shirt. Our designers always create fun shirts that are worn for years to come. Includes your logo on sleeve of shirt. Pricing includes single color logo imprint. Full color logo imprint available at an additional cost.



Breakfast

\$7,500 | 1 AVAILABLE

Sponsorship includes prominent branding at all breakfast stations for one day of event.



Lunch

\$15,000 | 1 AVAILABLE

Sponsorship includes prominent branding at all breakfast stations for one day of event.



Keynote Chair Drop

\$5,000 | 2 AVAILABLE

One piece of your company's collateral will be put on every chair in the keynotes session. Collateral to be provided and shipped to venue by sponsor.



Wireless Access Sponsorship

\$7,500 | 1 AVAILABLE

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



Video Loop in Digital Signage

\$5,000 | 10 AVAILABLE

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



Recharge Station

\$5,000 | 3 AVAILABLE

Sponsorship includes prominent logo branding at charging station.

CONTINUES ON NEXT PAGE

Interested in sponsoring multiple events or adding additional marketing and promotional opportunities? We offer customized sponsorship packages to meet your company's goals and needs.

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 on-site 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.



2024 SPONSORSHIP PROSPECTUS

2024 FINOS EVENTS

New York

Open Source in Finance Forum
September 30 - October 1, 2024

London

Open Source in Finance Forum
June 26, 2024

Open Source in Fintech Meetups

For upcoming meetups and webinars:
finos.org/news-and-events

CONTACT US

For more information on sponsoring:
sponsorships@linuxfoundation.org

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](https://www.finos.org/members)

FINOS MEMBER COMPANIES



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.