



SIFMA and The Wall Street Tax Educational Corporation present

Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 3-4, 2017 | SIFMA CONFERENCE CENTER, NYC

SPONSORSHIP OPPORTUNITIES

Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 3-4, 2017 | SIFMA CONFERENCE CENTER, NYC

We invite you to participate as a supporting sponsor of this year's Global Tax Reporting Symposium, providing an in-depth perspective on financial services reporting and withholding in today's global marketplace, will bring together industry and government experts to discuss the evolving tax compliance regimes. This event will allow you to interact with your colleagues, prospects and the government officials who administer critical and fast evolving tax compliance regimes, including:

- IRC Section 871(m),
- Chapter 3 and 61 Reporting & Withholding,
- FATCA,
- Qualified Intermediary (QI) Rules, and the
- OECD Common Reporting Standard (CRS).

THE TARGET AUDIENCE will include senior executives representing SIFMA Member Firms responsible for Technology, Operations & Compliance, Technology & Risk, as well as Information Security and Network Management.

To reserve your sponsorship, please contact:

Diana Serri | 212.313.1258 | dserri@sifma.org
Vice President, Head of Exhibit & Sponsorship Sales | SIFMA

Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 3-4, 2017 | SIFMA CONFERENCE CENTER, NYC

SPONSORSHIP	AVAILABILITY	INVESTMENT	INCLUDES
PLATINUM			
<p>VIP Dinner with Committee Members and Speakers</p> <p>The VIP Dinner will be held in a private area or room at an upscale New York City Restaurant.</p>	<p>Available Tuesday, October 3</p>	<p>\$10,000 SIFMA MEMBER RATE \$11,500 NON-MEMBER RATE</p>	<p>Four (4) Symposium Registrations Two (2) Seats to attend Dinner Table Display & Two (2) Table Staffers for the duration of the Symposium</p>
GOLD			
<p>Networking Cocktail Reception</p> <p>The Networking Cocktail Reception is an opportunity for participants to come together and catch up on the day's event, networking with colleagues, clients and new prospects in an enjoyable atmosphere. The reception is hosted in the sponsor showcase area, offering attendees cocktails as well as a variety of hot & cold hors d'oeuvres.</p>	<p>Reserved Tuesday, October 3</p>	<p>\$7,500 SIFMA MEMBER RATE \$9,000 NON-MEMBER RATE</p>	<p>Three (3) Symposium Registrations</p>
<p>Networking Lunch</p> <p>The Networking Lunch is an opportunity offering prominent brand recognition, serving a variety hot and cold luncheon selections, set in the sponsor showcase area, allowing for one-on-one conversations with industry colleagues, clients and new prospects.</p>	<p>Available Wednesday, October 4</p>	<p>\$7,000 SIFMA MEMBER RATE \$8,500 NON-MEMBER RATE</p>	<p>Three (3) Symposium Registrations</p>

To reserve your sponsorship, please contact:

Diana Serri | 212.313.1258 | dserri@sifma.org
Vice President, Head of Exhibit & Sponsorship Sales | SIFMA

Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 3-4, 2017 | SIFMA CONFERENCE CENTER, NYC

SPONSORSHIP	AVAILABILITY	INVESTMENT	INCLUDES
SILVER			
<p>Continental Breakfast</p> <p>The Continental Breakfast opportunity offers prominent brand recognition, serving a variety hot and cold breakfast selections, set in the sponsor showcase area, allowing for one-on-one conversations with industry colleagues, clients and new prospects.</p>	<p>Reserved Wednesday, October 4</p>	<p>\$6,000 SIFMA MEMBER RATE \$7,500 NON-MEMBER RATE</p>	<p>Two (2) Symposium Registrations</p>
<p>NEW FOR 2017!</p> <p>Audience Response System</p> <p>The Audience Response System offers an interactive session, with live polling and voting built directly into each speaker's presentation with live results shared during the presentations. This interactive session will allow attendees to vote via a keypad/clicker and obtain live results instantly. The Audience Response System is a great way to keep the attention of participants and offers Sponsoring firm's branding with logo displayed during the presentation on the general session slide deck.</p>	<p>Available Wednesday, October 4</p>	<p>\$6,000 SIFMA MEMBER RATE \$7,500 NON-MEMBER RATE</p>	<p>Two (2) Symposium Registrations</p>
<p>Badge Lanyard</p> <p>Co-Branded with SIFMA, pre-approved lanyard produced by sponsoring firm and distributed with registration materials to all symposium participants and worn throughout the Symposium.</p>	<p>Reserved</p>	<p>\$6,000 SIFMA MEMBER RATE \$7,500 NON-MEMBER RATE</p>	<p>Two (2) Symposium Registrations</p>

To reserve your sponsorship, please contact:

Diana Serri | 212.313.1258 | dserri@sifma.org
Vice President, Head of Exhibit & Sponsorship Sales | SIFMA

Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 3-4, 2017 | SIFMA CONFERENCE CENTER, NYC

SPONSORSHIP	AVAILABILITY	INVESTMENT	INCLUDES
SILVER			
<p>NEW FOR 2017!</p> <p>Branded Note Pads / Writing Tablet & Pens</p> <p>Co-Branded with SIFMA, Writing Tablet, produced and provided by sponsoring firm, and distributed to all participants during registration.</p>	Available	<p>\$6,000 SIFMA MEMBER RATE</p> <p>\$7,500 NON-MEMBER RATE</p>	Two (2) Symposium Registrations
<p>NEW FOR 2017!</p> <p>Digital Symposium Guide & WiFi For Attendees</p> <p>SIFMA Digital Symposium Guide is the go-to resource to which attendees will turn for information on sponsors, symposium schedule, session descriptions, speaker bios and much more. Deadline applies. WiFi Branding will be on signage in various outlets within the conference center, acknowledging sponsoring firm as the WiFi Sponsor.</p>	Available	<p>\$6,000 SIFMA MEMBER RATE</p> <p>\$7,500 NON-MEMBER RATE</p>	Two (2) Symposium Registrations
<p>Tote Bag</p> <p>Co-Branded as a Proud Supporter of SIFMA, Attendee Tote Bags are produced and provided by sponsoring firm. Program materials will be placed inside each bag and distributed to all participants during registration.</p>	Reserved	<p>\$6,000 SIFMA MEMBER RATE</p> <p>\$7,500 NON-MEMBER RATE</p>	Two (2) Symposium Registrations

To reserve your sponsorship, please contact:

Diana Serri | 212.313.1258 | dserri@sifma.org
Vice President, Head of Exhibit & Sponsorship Sales | SIFMA

Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 3-4, 2017 | SIFMA CONFERENCE CENTER, NYC

SPONSORSHIP	AVAILABILITY	INVESTMENT	INCLUDES
BRONZE			
<p>Morning Networking Break</p> <p>The Networking Break is an opportunity offering prominent brand recognition, serving a variety of healthy snacks, as well as hot and cold beverages, set in the sponsor showcase area, allowing for one-on-one conversations with industry colleagues, clients and new prospects.</p>	<p>Reserved Wednesday, October 4</p>	<p>\$5,000 SIFMA MEMBER RATE \$6,500 NON-MEMBER RATE</p>	<p>One (1) Symposium Registration</p>
<p>Registration & Welcome Hospitality</p> <p>The Networking Hospitality is an opportunity offering prominent brand recognition, serving a light sandwich lunch as well as hot and cold beverages, set in the sponsor showcase area, allowing for one-on-one conversations with industry colleagues, clients and new prospects as the check in for the event.</p>	<p>Reserved Tuesday, October 3</p>	<p>\$5,000 SIFMA MEMBER RATE \$6,500 NON-MEMBER RATE</p>	<p>One (1) Symposium Registration</p>
<p>Afternoon Refreshment Break</p> <p>The Networking Refreshment Break is an opportunity offering prominent brand recognition, serving a variety of healthy snacks as well as hot and cold beverages, set in the sponsor showcase area, allowing for one-on-one conversations with industry colleagues, clients and new prospects.</p>	<p>Reserved</p>	<p>\$5,000 SIFMA MEMBER RATE \$6,500 NON-MEMBER RATE</p>	<p>One (1) Symposium Registration</p>

To reserve your sponsorship, please contact:

Diana Serri | 212.313.1258 | dserri@sifma.org
Vice President, Head of Exhibit & Sponsorship Sales | SIFMA

Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 3-4, 2017 | SIFMA CONFERENCE CENTER, NYC

The Global Tax Reporting Symposium Benefits Package offers sponsors a multitude of benefits — starting with Pre-Symposium branding via targeted email campaigns, promoting the event and continues throughout beyond with the targeted emails on the Post Event Highlights and other notifications.

Pre-Symposium Benefits

- Prominent placement of logo and firm profile on SIFMA's Global Tax Reporting Symposium website.
- Prominent placement of logo on SIFMA's Dedicated sends, which include email campaigns highlighting dates, program, etc. reaching more than 10,000 individuals.
- Preliminary mailing lists of all Symposium attendees in electronic format sent in advance of the symposium, that includes Participants Name, Title, Firm Affiliation and Postal Address.

Dates of Symposium Benefits

- Complimentary Symposium Registration(s)
- Access to food and networking functions
- Table Display & Two (2) exhibitor table personnel badges
- Prominent brand recognition during the sponsored function (if applicable), with logo displayed on dedicated signage, that includes both print and digital formats, strategically placed in various outlets that include registration area, general session slide deck, etc.
- Dedicated sponsor listing included on the symposium Digital Event Guide, branding company logo, listing contact name and company profile.
- Company listing and description on seminar website

Post- Symposium Benefits

- Listing company name, placement of logo and firm profile on SIFMA website, following the seminar for an additional six (6) months.
- Complete mailing lists of all Symposium attendees in electronic format sent at the conclusion of the symposium.
- Logo placement on post event Highlights Page as well as on Attendee Survey email.

To reserve your sponsorship, please contact:

Diana Serri | 212.313.1258 | dserri@sifma.org
Vice President, Head of Exhibit & Sponsorship Sales | SIFMA

Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 3-4, 2017 | SIFMA CONFERENCE CENTER, NYC

2016 Participating Firms

Ameriprise Financial, Inc.	Deloitte & Touche LLP	Janney Montgomery Scott LLC	SIFMA
AQR Capital Management, LLC	Depository Trust & Clearing Corporation (DTCC)	Jefferies LLC	SIX Financial Information USA Inc.
Baker & McKenzie, LLP	Desjardins Securities	JPMorgan Chase & Co.	Societe Generale
Baker Tilly Virchow Krause, LLP	Deutsche Bank AG	KPMG LLP	Sovos Compliance
Bank of America Merrill Lynch	Dun & Bradstreet	Manulife Asset Management	State Street Bank and Trust Company
Barclays Capital Inc.	E*Trade Securities LLC	Mazars USA LLP	Sullivan & Cromwell LLP
BlackRock, Inc.	EisnerAmper LLP	Merit Software	Tax Analysts
Bloomberg BNA	Ernst & Young LLP	Moore Capital Management, LP	The Hill
BNP Paribas	FinOps Report	Morgan Stanley & Co. LLC	The Northern Trust Company
BNY Mellon Corporation	General Electric Company	National Bank Financial	The Organisation for Economic Co-operation and Development (OECD)
Broadridge Financial Solutions, Inc.	GlobeTax	National Financial Services LLC	U.S. Bank
Brown Brothers Harriman & Co.	Goldman, Sachs & Co.	Nomura Holding America Inc.	U.S. Department of the Treasury
Canadian Imperial Bank of Commerce (CIBC)	Guggenheim Partners, LLC	Penton Wealth Management	UBS AG
Capco	IHS Markit	Pershing LLC, a BNY Mellon Company	Vanguard Group, Inc.
Charles Schwab & Co., Inc.	Industrial and Commercial Bank of China Financial Services LLC	PwC	Vision Financial Markets LLC
Citadel LLC	Internal Revenue Service (IRS)	RBC Capital Markets, LLC	Washington Council Ernst & Young (WCEY)
Citi	International Fund Services (NA) LLC, a State Street Company	Royal Bank of Canada (RBC)	Wolters Kluwer
Cleary Gottlieb Steen & Hamilton LLP		S&P Global Inc.	
Credit Suisse Securities (USA) LLC		Scotiabank	

To reserve your sponsorship, please contact:

Diana Serri | 212.313.1258 | dserri@sifma.org
Vice President, Head of Exhibit & Sponsorship Sales | SIFMA