

SIFMA and The Wall Street Tax Educational Corporation present

# Global Tax Reporting Symposium

The Latest on Reporting and Withholding

OCTOBER 16-17, 2018 | SIFMA CONFERENCE CENTER, NYC

Planning for SIFMA's Global Tax Reporting Symposium is underway and we invite you to participate as a supporting sponsor of this year's event that will provide 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 government officials who administer critical and fast evolving tax compliance regimes, including:

- IRC Section 871(m)
- Chapter 3, 4 and 61 Reporting & Withholding
- FATCA and CRS
- Qualified Intermediary (QI) and Qualified Derivative Dealer (QDD) Rules, and Responsible Officer Requirements
- Challenges in Foreign Withholding and Reclaims
- Impact of Tax Reform and TCJA

**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.

## Available Sponsorship Opportunities:

### Tuesday, October 16

**Bronze:**

Investment:

Includes:

**Welcome Hospitality – SOLD!**

**\$5,500 - SIFMA Member Rate**

\$7,000 - Non-Member Rate

One (1) Symposium Registration

*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.*



**Broadridge®**

**Bronze:**

Investment:

Includes:

**Afternoon Refreshment Break – SOLD!**

**\$5,500 - SIFMA Member Rate**

\$7,000 - Non-Member Rate


One (1) Symposium Registration

*The Networking Refreshment Break is an opportunity offering prominent brand recognition, serving a variety of healthy snacks as well as hot and*

**Deloitte.**

*cold beverages, set in the sponsor showcase area, allowing for one-on-one conversations with industry colleagues, clients and new prospects.*

**Gold:**  
Investment: **Networking Cocktail Reception, Tuesday, October 16<sup>th</sup> – SOLD!**  
**\$8,000 - SIFMA Member Rate**  
\$9,500 - Non-Member Rate  
Includes: Three (3) Symposium Registrations



*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.*


**Bronze**  
Investment: **VIP Dinner**  
**Tuesday, October 16<sup>th</sup> - SOLD!**  
**\$5,000 - SIFMA Member Rate**  
\$6,500 - Non-Member Rate  
Includes: Two (2) Symposium Registrations  
Two (2) Seats to attend Dinner



*The VIP Dinner will be held in a private area or room at an upscale New York City Restaurant.*


**Wednesday, October 17**

**Silver:**  
Investment: **Continental Breakfast – SOLD!**  
**\$6,500 - SIFMA Member Rate**  
\$8,000 - Non-Member Rate  
Includes: Two (2) Symposium Registrations




*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.*

**Bronze:**  
Investment: **Morning Networking Break – SOLD!**  
**\$5,500 - SIFMA Member Rate**  
\$7,000 - Non-Member Rate  
Includes: One (1) Symposium Registration



*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.*

**Gold:**  
Investment: **Networking Lunch – SOLD!**  
**\$8,000 - SIFMA Member Rate**  
\$9,500 - Non-Member Rate  
Includes: Three (3) Symposium Registrations



*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.*

**Silver:**  
Investment:  
Includes:

**Audience Response System – SOLD!**

**\$6,500 - SIFMA Member Rate**  
\$8,000 - Non-Member Rate



Financial Information

Two (2) Symposium Registrations  
*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.*

**Silver:**  
Investment:  
Includes:

**Badge Lanyard – SOLD!**

**\$6,500 - SIFMA Member Rate**  
\$8,000 - Non-Member Rate



Two (2) Symposium Registrations  
*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.*

**Silver:**  
Investment:  
Includes:

**Branded Notepads & Pens – SOLD!**

**\$6,500 - SIFMA Member Rate**  
\$8,000 - Non-Member Rate



Two (2) Symposium Registrations  
*Co-Branded with SIFMA, Writing Tablet, produced and provided by sponsoring firm, and distributed to all participants during registration.*

**Silver:**  
Investment:  
Includes:

**Digital Symposium Guide & Wi-Fi For Attendees – SOLD!**

**\$6,500 - SIFMA Member Rate**  
\$8,000 - Non-Member Rate



Two (2) Symposium Registrations  
*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.*

**Silver:**  
Investment:  
Includes:

**Tote Bag – SOLD!**

**\$6,500 - SIFMA Member Rate**  
\$8,000 - Non-Member Rate



Two (2) Symposium Registrations  
*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.*

The Global Tax Reporting Symposium Sponsorship Benefits Package offers sponsors a multitude of benefits - starting with Pre-Symposium branding via targeted email campaigns, promoting the event and continues throughout and 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 70,000 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  
Vice President, Head of Exhibit & Sponsorship Sales  
SIFMA  
212.313.1258  
[dserri@sifma.org](mailto:dserri@sifma.org)