

ISITC SECURITIES OPERATIONS SUMMIT 2027

MARKETS IN MOTION

Markets in Motion:
Turning Transformation into Operational Reality

March 22 - 24, 2027
Boston Renaissance Seaport Hotel, Boston, MA

Make **Connections** with over **250 Industry-Specific Representatives.**

Step Into the Future at ISITC's 33rd Annual Securities Operations Summit!

This isn't your typical industry conference—it's a high-energy convergence of broker/dealers, custodians, investment managers, vendors, utilities, and visionary leaders shaping the future of financial operations.

Who Attends?
You'll be in the company of top-tier professionals: executive directors, vice presidents, managing directors, and senior leaders from the world's leading financial institutions. The Summit also attracts specialized experts—product managers, compliance leads, analysts, and consultants—creating a unique environment where strategic vision meets operational execution.

Why Exhibit?
Because this is where the future of securities operations is being written. Be part of the action. Be part of the revolution. Be part of the legacy.

Join us at the 33rd Annual Securities Operations Summit—where innovation meets impact.

isitc.org **#ISITCSummit2027**

Exhibitor Information

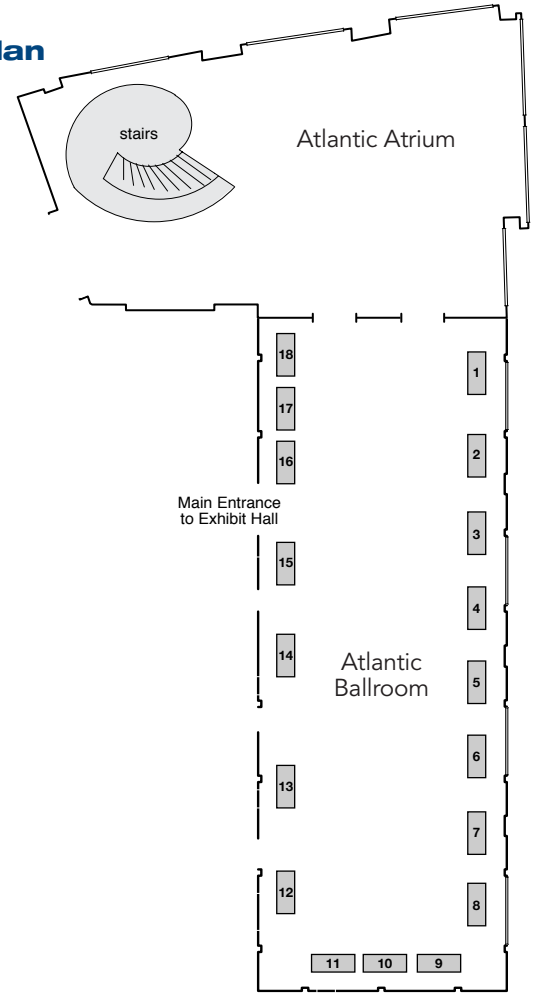
EXHIBIT TABLE

	Early Registration Fee On or before **Friday, February 19, 2027**	Late Registration Fee After **Friday, February 19, 2027**
ISITC Member	$3,000	$3,500
ISITC Non-Member	$3,800	$4,300

Exhibit Table includes

- One (1) 6' draped table, (6' x 30") and two (2) chairs, no pipe and drape provided. All exhibit materials must fit either on the top of the table or directly behind the table. Banner stands, pull-up screens and other signage is allowed, however they may not block the view to other exhibitors. Pop-up booths larger than 6' wide are not allowed in the exhibit area.
- Two (2) complimentary exhibitor passes providing access to the entire conference (Monday - Wednesday).
- Since everyone loved the extended hours last year, we will be doing it again! The Exhibit Hall will be open on Monday Evening during the Cocktail Reception, all day Tuesday and Wednesday through lunch time.
- A virtual booth in the Mobile App, where you will be able to create a profile, upload documents, interact with attendees, and more.
- Complimentary listing on the conference webpage, in the Conference Mobile App, and signage at the event.
- Preliminary list of conference registrants is sent out 2 weeks prior to the event. This is in electronic format, and includes name, title, firm and mailing address. Email address of attendee will only be provided if they opt-in to share it.
- A final list of conference attendees is sent out one week after the show.

Exhibitor Floorplan



Exhibitor Information

Important Dates

SET-UP:

Monday, March 22, 2027, 1:00pm – 4:30pm

EXHIBITOR HOURS:

Monday, March 22, 2027, 5:00 – 6:30pm
Cocktail Reception in the Exhibit Area

Tuesday, March 23, 2027, 8:00am – 6:30pm
Breakfast, Lunch, Breaks, and Cocktail Reception in the Exhibit Area

Wednesday, March 24, 2027, 8:00am – 1:15pm
Breakfast, Morning Break and Lunch in the Exhibit Area

BREAKDOWN:

Wednesday, March 24, 2027, 1:15pm - 3:00pm

***Note: Times subject to change with the finalization of agenda. No early break down is allowed.** You will not be allowed to break down until the conclusion of the Lunch on Wednesday, March 24, 2027.

Deadline Dates to Remember

February 19, 2027
Exhibitor Early Registration Deadline
Exhibitor Cancellation deadline for refund
Exhibitor Booth Payment Due

March 8, 2027
Preliminary list of conference registrants sent to exhibitors

Exhibitor/Sponsor Profile in Conference Mobile App filled out, including any digital ads

Table Location Disclaimer

Vendors will be able to reserve table locations in the exhibit area once payment has been received. Please be aware that Show Management reserves the right to make reasonable shifts in table locations for the betterment of the exhibition.

Payment and Remittance Policy

It is the policy of ISITC that all exhibitors must be paid prior to the show. To guarantee your table location you must register and be paid in full by Friday, February 19, 2027. Booth locations are assigned on a first-come, first-serve basis. You will not be admitted into the exhibit hall if a balance is due on your account.

Cancellation Policies

By the Exhibitor: You may cancel your exhibitor registration with a refund, less $400 administrative charge, provided the ISITC Registration Office receives notification in writing on or before **Friday, February 19, 2027. Cancellations after this date will not be refunded.**

Substitutions of participants from the same institution may be made at any time. Please notify the association in writing of any change in participants.

By ISITC: If ISITC unilaterally cancels your registration before the Show, ISITC shall reimburse all amounts paid by your Institution to ISITC under this Registration Policy.

Vendor Give-away Drawings Policy

Vendors may sponsor individual drawings or giveaways at their tables. Each vendor is solely responsible for its own drawing and for contacting the winners. ISITC will not provide for announcements of the winners during the show. This policy does not apply to the Vendor Forum sponsored raffle.

Attendee Mailing List Policy

The following are conditions for the release of attendee information:
The current attendee list will be sent two weeks prior to the event. This list will be available as a PDF file or Excel spreadsheet and will contain mailing information **only** (no phone, fax or email unless the attendee opts-in to share that information). A list of those registered about one week prior to the event will be distributed at the conference in printed format.

The final attendee list will be distributed to exhibiting companies one week after the show as an Excel spreadsheet.

The exhibiting company must be registered and paid in full prior to the release of the current attendee list.

The attendee list from last year's show is available upon request and will contain only the attendee's name and company. If your company exhibited at last year's show, you are then entitled to the complete mailing information of all attendees.

Sponsorship Opportunities

SPONSORSHIP LEVELS

	PLATINUM $7,500	GOLD $6,000	SILVER $4,500	BRONZE $2,500
Exhibit Table Package* *(includes items below)*	●	●		
Sponsor of One Event** *(choices noted below)*	●	●	●	●
Sponsor of One Promotional Giveaway*** *(choices noted below)*	●			
Sponsor/Co-sponsor of the Conference Mobile App	●			
Sponsor Post in Interact section in the Conference Mobile App	●	●	●	●
Banner Ad in the Conference Mobile App	●	●	●	●
Complimentary Full Conference Passes	FOUR	THREE	TWO	ONE
Recognition, including company logo, on signage at the event	●	●	●	●
Recognition, including company logo, in the Conference Mobile App	●	●	●	●
Recognition, including company logo and link to company website, on the ISITC website	●	●	●	●
Recognition, including company logo, in social media posts and registration blast emails	●	●	●	●

*Exhibit Table Package

- *One (1) 6' draped table, (6' x 30") and two (2) chairs, no pipe and drape provided.*
- *Two (2) complimentary exhibitor passes providing access to the entire conference (Monday - Wednesday).*
- *Exhibit Hall will be open on Monday Evening during the Cocktail Reception, all day Tuesday and Wednesday through lunch time.*
- *A virtual booth in the Mobile App, where you will be able to create a profile, upload documents, interact with attendees, and more.*
- *Complimentary listing on the conference webpage, in the Conference Mobile App, and signage at the event.*
- *Preliminary list of conference registrants is sent out 2 weeks prior to the event.*
- *A final list of conference attendees is sent out one week after the show.*

**Sponsor of One Event Options

- *Platinum, Gold or Silver - Monday Welcome Reception, Tuesday Cocktail Reception, Tuesday Breakfast, Tuesday Lunch, Wednesday Breakfast, Wednesday Lunch*
  **Diamond and Sapphire Partners get first choice. Subsequent is by sponsorship level and registration date.*
- *Bronze - Coffee break: Tuesday morning; Tuesday afternoon, Wednesday morning; Wednesday afternoon*

***Sponsor of One Promotional Give-away

ISITC will choose and supply the items with approval from the sponsor, unless the sponsor wants to provide their own item.

- *Attendee bags with your company logo printed on them*
- *Meeting space Wi-Fi with your company name as the password*
- *Key cards with your company logo printed on them*
- *Notepad & pen with your company logo printed on them*
- *Water bottles/Coffee Mugs with your company logo printed on them*
- *Lanyard with your company logo printed on them*
- *Luggage tags with your company logo printed on them*
- *Other promotional item of your choosing with approval from ISITC*

Note: Choices are First Come / First Serve

Sponsorship & Advertising Opportunities

INDIVIDUAL SPONSORSHIPS

Innovation Forum - $2,500 *Limited quantity available*
- Take advantage of an Innovation Forum where you can demonstrate a product of your firm's to the ISITC attendees. This demonstration will be 20 minutes long and take place in a dedicated room where a screen, projector, microphone and speaker (if needed) will be provided.
- Recognition includes company logo in the Conference Mobile App, event signage, ISITC website, and more.

Meeting Lounge - $1,500
- When attendees need to take a break, take a phone call or work for a few minutes on their laptop, it's great to have a spot for them to do this. Sponsor the meeting lounge which will include complimentary Wi-Fi, power strips for people to plug-in their devices, and soft drinks and water.
- Recognition includes company logo in the Conference Mobile App, event signage, ISITC website, and more.

Meeting Space Wi-Fi - $1,800 **Available if Platinum sponsor doesn't choose it*
- Everyone needs to stay connected during the meeting - provide that opportunity by sponsoring the Wi-Fi in the meeting space throughout the whole meeting.
- Recognition includes choosing the password for the Wi-Fi, company logo in the Conference Mobile App, event signage, ISITC website, and more.

Luggage Tag - $1,800 **Available if Platinum sponsor doesn't choose it*
- Have your company brand shown all over the world when you sponsor the luggage tags.
- Recognition includes logo on the luggage tag, company logo in the Conference Mobile App, event signage, ISITC website, and more.

Charging Station - $2,000 each *(two available)*
- With almost all attendees using their phones, tablets and mobile devices throughout the event, a custom-branded charging station positioned in a high-traffic area of the hotel is an ideal way to garner impressions and appreciation from attendees while enhancing your brand and message.
- Recognition includes company logo on the charging station, company logo in the Conference Mobile App, event signage, ISITC website, and more.

Key Card - $2,000 **Available if Platinum sponsor doesn't choose it*
- Make an impression from the time attendees check in. Unlock a huge range of exposure by providing a custom key card with your company name and logo prominently displayed on it which is provided to all conference attendees staying in the hotel.
- Recognition includes artwork on the keycard, company logo in the Conference Mobile App, event signage, ISITC website, and more.

Lanyard - $2,500 **Available if Platinum sponsor doesn't choose it*
- Brand every attendee's neck with a custom lanyard seen throughout the entire show!
- Recognition includes company logo on the lanyard, company logo in the Conference Mobile App, event signage, ISITC website, and more.

Notepad & Pen - $2,500 **Available if Platinum sponsor doesn't choose it*
- Even as technology continues to evolve, when it comes to note taking, nothing beats the immediacy and ease of putting pen to paper. Help attendees record their conference experience while imprinting your brand as they take notes during the conference.
- Recognition includes logo on the notepad/pen, company logo in the Conference Mobile App, event signage, ISITC website, and more.

Water bottle/Coffee mug - $2,500 **Available if Platinum sponsor doesn't choose it*
- Everyone needs to stay hydrated so, why not sponsor a water bottle or coffee mug that attendees can use while in session?
- Recognition includes logo on the water bottle/coffee mug, company logo in the Conference Mobile App, event signage, ISITC website, and more.

Headshot Photographer - $4,000
- Everyone needs a professional head shot and they're probably looking for a new one. Provide this opportunity for the attendees during the conference at a location next to your booth.
- Recognition includes company logo in the Conference Mobile App, event signage, ISITC website, and more.

ADVERTISING OPPORTUNITY

Conference Mobile App Ad
- Encourage attendees to visit your table by placing an ad in the Conference Mobile App. The Conference Mobile App contains important information such as the full agenda, the Working Group, Forum, and Focus Session agendas, the exhibitor floorplan and more, which attendees will refer to every day.

Cost: $500

General Terms and Conditions for Exhibiting

ISITC
Leading Financial Services Into The Future

Application to Exhibit:
Applications to exhibit are subject to the criteria below, and review and approval by the Association. Exhibits may not be inconsistent with the professional nature and goals of the event.
The criteria shall include:

- Exhibit fees must be paid in full prior to the show.
- No Recruiting Agencies shall be permitted to exhibit.
- The Association reserves the right to request a description of your company and information/ materials you intend to exhibit.

Exhibit space is not intended for airing views of a controversial social, political, or professional issue. In addition, the Association reserves the right to decline exhibit requests from companies exhibiting products and services that could be considered competing with the intent of the event.

Potential exhibitors are advised that contests, lotteries, raffles, and games of chance may not be conducted without prior approval of the Association.

Contractual Agreement:
It is agreed that the exhibitor will abide by the rules and regulations cited during and after the exhibit and by other reasonable rules considered necessary by the Association or Hotel provided that these rules do not materially alter the exhibitor's contractual rights.

All matters and questions not covered by these regulations are at the decision of Show Management. These regulations may be amended at any time by the Association, and all amendments that may be so made shall be equally binding upon publication on all parties affected by them, as are the original regulations.

Disclaimer:
All matters and questions not covered by this prospectus are at the discretion of, and may be amended at any time, by the Association executive office.

Exhibitor agrees to adhere to the space restrictions as defined in the 'Exhibit Fees' section of this Exhibitor Prospectus. Failure to comply may result in the termination of Exhibit privileges, at the discretion of Show Management. In such cases, no refund of Exhibitor fees will be offered.

Show Management Sole Discretion:
Space assignment shall be as indicated on the Exhibit Space Floor plan, which will be included with your Confirmation and Exhibitor Manual. However, should conditions or situations warrant, show management reserves the right to rearrange exhibitors or adjust the floor plan to accommodate the best interest of the Show. The floor plan maintained by Show Management shall be the official floor plan. Change may occur at any time to accommodate show needs.

The Exhibitor agrees to comply with and be bound by all laws of the United States, the State and city where the exhibit is held, and wherever applicable, all rules and regulations of the Police Department and Fire Department and those policies and criteria which have been established by the hotel for use of the designated exhibit area.

The Exhibitor must conform to all standard fire codes. Combustible materials or explosives are not permitted in or around the exhibit areas. Displays must not block view of, or impede access to, fire alarm boxes, fire hose cabinets, fire extinguishers, or other safety equipment.

Neither Show Management nor the Hotel shall be responsible for any damage or injury that may happen to the Exhibitor or its agents, servants, employees, or property from any cause whatsoever, except the gross negligence or willful misconduct of Show Management, its servants or employees, arising out of Show Management's duties and responsibilities under the agreement. The Exhibitor expressly releases Show Management and the Hotel, its directors, officers, agents, employees, and/or servants from any such loss, damage or injury.

Show Management and the Exhibitor agree to waive the right of subrogation by their insurance carriers to recover loss sustained under the respective insurance contracts for real and personal property.

Show Management, its staff, employees, or agents assume no responsibility or liability whatsoever in matters relating to restrictions imposed on any exhibitor by any governmental agency. The Exhibitor is responsible for any and all demands on account of any injury or death, or damage to property occurring in or upon any portion of the hotel leased or used by the Exhibitor, or its employees, representatives, servants, agents, licensees, invitees, patrons, guests, or contractors.

The Exhibitor shall defend, indemnify and hold harmless the ISITC, Professional Management Associates, LLC, and its officers, employees, and agents from and against any and all claims, demands, actions, causes of action, penalties, judgment, and liability of every kind and description (including court costs and reasonable attorney's fee) for injury to and death of persons and/or damage to or any loss of property which are caused by, arise from, or grow out of the Exhibitor's use or occupancy of the premises or from any breach by the Exhibitor of any condition of this contract, or from any act or omission of the Exhibitor, or its employees, representatives, servants, agents, invitees, patrons, guests, licensees, or contractors.

Non-exhibiting Supplier Status:
Non-exhibiting suppliers may not "suitcase" the show in order to approach attendees and exhibitors for the purpose of selling their products in the aisles. This practice is prohibited by Show regulations.

Any non-exhibitor who is observed approaching buyers in the aisle or in an exhibitor's booth will be asked to curtail this activity or exit the show. These measures will be strictly enforced with the intent of preserving the integrity of the Show and maintaining a good relationship between attendee and exhibitor.