



2026 ALM First Financial Institute Wraps Up with Insightful Key Takeaways after 3-Days of Learning

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Dallas, TX – The 2026 ALM First Financial Institute wrapped up yesterday after three days of educational sessions at The Ritz-Carlton Dallas, Las Colinas. The industry-leading conference closed with a general session on *Applying the Playbook: A Strategic Decision Capstone*.

Other general sessions on the final day of the conference included an informative presentation on *Impact-Driven Investment Strategies* and an interactive discussion on *Expanding Opportunity through Secondary Loan Markets*.

The conference also included 25 in-depth sessions categorized into the learning tracks: *Board, Fundamental, and Funds Management*, which included two specialized paths concentrated on *Portfolio Management* and *Balance Sheet Management*, with each customized to meet the knowledge level of attendees and best serve their role within the institution.

This year, a record-setting 215 financial professionals attended the in-person event, which was designed to equip attendees with the tools and strategies needed to confidently manage asset liability management (ALM) and balance sheet complexities in today's fast-paced financial environment.

More information about ALM First's upcoming 2026 events including the Derivatives Symposium (June 8 – 9), Financial Forum (September 20- 23) and the Governance & Leadership Symposium (November 8 -10) may be found at www.almfirst.com.



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ALM First was founded in 1995 as a strategic partner for depositories, offering an array of financial advisory services. The firm's expertise in asset liability management, investment management, balance sheet strategy, secondary market solutions, and specialty financial services, has allowed it to deliver deeper insights into financial institutions' balance sheets, strengthening their performance and building efficiencies. With approximately \$77 billion of investments under management (as of December 31, 2025), ALM First Financial Advisors is an SEC-registered investment advisor, acting as an unbiased third party, offering commission-free, fee-based services to over 300 financial institutions across the country.



In recent years, ALM First Group has expanded to include several wholly-owned subsidiaries including DDJ Myers, an ALM First Company and ALM First Executive Benefits, LLC. Driven by client needs, the firm now offers various services to help financial institutions optimize their greatest assets – their people.

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