



Registration Now Open for 2026 ALM First Financial Forum

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Dallas, Texas – Financial institution executives and board members are encouraged to register now for [ALM First's 2026 Financial Forum](#), the firm's flagship conference which regularly sells out each year. This year's Financial Forum will be held on **September 20 – 23** at The Four Seasons Austin in Austin, TX. The annual three-day conference is the premier event for financial professionals and board members to discover insights, formulate strategies, and gain new perspectives as they prepare for the coming year.

With two separate education tracks led by a variety of industry experts and numerous networking events, the 2026 ALM First Financial Forum is a must-attend event for everyone involved in managing or monitoring the balance sheet including executives, senior leadership, treasury staff, ALCO and board members.

"Now more than ever, it's vital that depository leaders understand emerging trends, effective tools and best practices to navigate challenges successfully," said Emily Hollis, CFA, CEO of ALM First. "We're proud to provide timely opportunities for financial professionals to learn about innovative strategies, network with peers, and gain insights to inform 2027 strategic planning."

[Online registration](#) is now open, with **early-bird pricing available through July 24, 2026.**

ALM First's management team, well-known for their expertise in ALM, investment portfolio strategies, loan transactions, merger advisory, secondary marketing, executive benefits, enterprise risk management, and balance sheet management, will lead educational presentations and discussions along with outside experts. The staff will also offer updates on the economy and insights into current trends affecting the industry and what a financial institution needs to be successful.

Attendees may earn more than 13 CPE credits. ALM First is committed to providing unbiased advice and education, and attendees can enjoy networking opportunities without pressure from external sponsors.



To register or learn more about the Financial Forum, visit www.almfirst.com/forum.

About ALM First

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.

"ALM First" is a brand name for a financial services business conducted by ALM First Group, LLC ("ALM First") through its wholly owned subsidiaries: ALM First Financial Advisors, LLC ("ALM First Financial Advisors"); ALM First Advisors, LLC ("ALM First Advisors"); ALM First Analytics, LLC ("ALM First Analytics") and ALM First Executive Benefits, LLC ("ALM First Executive Benefits").

Investment advisory services are offered through ALM First Financial Advisors, an SEC registered investment adviser. Access to ALM First Financial Advisors is only available to clients pursuant to an Investment Advisory Agreement and acceptance of ALM First Financial Advisors' Brochure.

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