Membership Prospectus
October 2016

The Symphony Software Foundation is an independent, non-profit organization that promotes and leverages the Symphony Platform in order to foster open innovation, industry standardization, and compliance for businesses' inter- and intra-firm communication, collaboration, and workflow productivity within the Financial Services industry.

About the Symphony Software Foundation

The Symphony Software Foundation engages in multiple Projects, including the flagship Symphony Open Source Project, the goals of which are:

❖ To promote the adoption of the Symphony Platform as the preferred global messaging, communications, workflow, and productivity platform.

❖ To host an arena of innovation focused on solving industry collaboration problems with a cooperative approach – through openness, interoperability, and standardization.

❖ To deliver an enterprise-grade platform in terms of security and compliance produced in a community and via enterprise-friendly governance that fosters open source contributions.

The Foundation's primary responsibility is to provide oversight through collective governance of the Symphony Open Source Project and other Projects contributed under the Foundation's umbrella. All governing bodies place extra emphasis on the Foundation's core values, which include:

• Openness • Leanness • Transparency
• Inclusivity • Meritocracy • Developer focus
• Cloud readiness • Enterprise grade

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Pillars of the Symphony Software Foundation

The Symphony Software Foundation pursues these goals through:

Open Governance

The collective governing bodies of the Foundation oversee the core development and the extensions of all Projects through an open and transparent decision-making process, while ensuring IP cleanliness and enterprise viability.

Industry Convergence

Through Member Working Groups and with the input of the community at large, the Symphony Software Foundation ensures the widest adoption and interoperability of the Symphony Platform, leveraging and, where applicable, defining industry-wide standards.

Code Foundry

The Symphony Software Foundation hosts open source development and releases of the Symphony Platform, API clients/SDKs, extension and integration patterns, utilities, libraries & developer tools, horizontal and 3rd-party platform integrations – all fostering security and compliance best practices.

Open Source Readiness

The Symphony Software Foundation enables productive two-way participation in the open source process from member organizations and the community at large, with enablement campaigns, open source readiness programs, and new contributor on-ramps.

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Governance of the Symphony Software Foundation

Board of Directors

The Board of Directors oversees all affairs and Projects. It consists of primarily of individuals nominated and elected by the Foundation's membership.

Engineering Steering Committee

The Engineering Steering Committee ("ESCo") is empowered by the Board of Directors to oversee the overall technical evolution of the Projects contributed to the Symphony Software Foundation, aligns roadmaps and releases, accepts contributed Projects, and helps define technical standards used by the Foundation.

Member Working Groups

Member Working Groups are comprised of member-driven committees impacting the design, architecture, and standardization choices of the Symphony Platform.

Committers

Committers develop and manage Projects under the umbrella of the Foundation.

Contributors

Contributors represent our community at large, providing code and documentation contributions, with a meritocracy-driven path to committership.

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Member Benefits of the Symphony Software Foundation

Access to the Developer Platform

Members receive exclusive access to the Foundation's developer platform, where they can develop open source apps, bots, and integrations for the Symphony Platform and work together to foster interoperability in financial services.

Strategy and Roadmap Influence

Member organizations are well-represented on the Foundation's Board of Directors and the Engineering Steering Committee. They influence the overall evolution of the Foundation's Projects and the Foundation's long-term roadmap.

Industry Working Groups

Member organizations participate in collaborative Working Groups that influence the design, standards, and architecture decisions of all Projects. Working Groups enable wider adoption and interoperability of the Symphony Platform, from conception to development.

Industry Surveys, Marketing, and Visibility

Through industry surveys, the Foundation provides members insight into usage of the Symphony Platform, global security and compliance trends, and open source readiness, driving focused and informed investments. Members also receive unique positioning in the Foundation's marketing campaigns, conferences, publicity, co-promotions, co-branding, sponsorships, hackathons, mailing lists, and online presence.

Platinum Members

The Foundation's Platinum Members include prominent financial institutions that have made a significant investment in the Symphony platform as end users and vendors.

Platinum Members*

Benefits of Platinum Membership

- Dedicated and permanent Board seat
- Participation in election of ESCo Member Leads
- Elect 1 ESCo Advisor (as a class)
- Top positioning in SSF marketing and PR
- Keynote opportunities at Foundation events
- Participation in Member Working Groups
- Exclusive voting rights on certain policies and procedures

*As of September 2016. List may not be comprehensive.

Gold Members

The Foundation's Gold Members include significant contributors to the Symphony ecosystem, including market data providers, large ISVs, technology partners.

Gold Members*

Benefits of Gold Membership

- Elect up to 5 Gold Directors (as a class)
- Participation in election of ESCo Member Leads
- Elect 1 ESCo Advisor (as a class)
- Prominent positioning in Foundation marketing and PR
- Participation in Member Working Groups
- Speaking engagements and fee waivers at Foundation events

*As of September 2016. List may not be comprehensive.

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Silver Members

The Foundation's new* Silver membership tier is designed to include a wide range of Symphony ecosystem participants—including FinTech firms, FinServ startups, and Symphony Integrators—in the Foundation's projects and governance.

Benefits of Silver Membership

- Participation in election of ESCo Member Leads
- Positioning in Foundation marketing and PR
- Participation in Member Working Groups
- Once 10 Silver members have joined
    - Elect 1 Silver Director (as a class)
    - Elect 1 ESCo Advisor (as a class)

* As of September 2016.

At-Large Members

The Foundation's At-Large Members* are individuals who contribute to the Foundation's projects and participate in its governance. At-Large membership is targeted toward leaders in the FinTech, open source, and unified communications fields.

Benefits of At-Large Membership

- Thought leadership and visibility at Open Source and FinTech events
- Participation in election of ESCo Member Leads
- Participation in Member Working Groups
- Once 20 At-Large members have joined
    - Elect 1 At-Large Director (as a class)
    - Elect 1 ESCo Advisor (as a class)

* At-Large membership is new as of September 2016.

Become a Member Organization

For more information or to apply for membership on behalf of your organization,
visit symphony.foundation/#become-a-member,
or contact:

Gabriele Columbro, Executive Director
Symphony Software Foundation
1117 California Avenue
Palo Alto, CA 94304 USA

info@symphony.foundation
+1-650-665-9773