



11th Annual

Digital Marketing for Financial Services Summit

NEW YORK

November 7 & 8, 2024 | New York Hilton Midtown

The only event series designed for financial services marketing & digital leaders

Driving customer growth through impactful digital marketing & experience strategies

Expert speakers include:



Lynn Teo
Chief Marketing Officer
Northwestern Mutual



Jennifer Ball
Chief Marketing Officer
Franklin Templeton



Judy Edelson
Chief Marketing Officer
Apple Bank



Alex Hachey
Vice President, Director of User Experience Design
T. Rowe Price



Matt Leslie
Managing Director, Global Head of Digital Product
J.P. Morgan Asset Management

WELCOME

SPEAKERS

AGENDA

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Welcome, Financial Services Growth Leaders!

Dear Colleagues,

Welcome to the 11th New York edition of the DMFS Summit, the flagship annual event of the DMFS series, which brings together **the most innovative, engaged and influential financial services leaders driving customer growth**.

The Summit is designed to support marketing, digital and experience leaders across a wide range of financial services with **strategic guidance, practical tips, effective tools and innovative technology**, delivered by the brightest minds in the industry.

We have curated a two-day agenda, packed with case studies, workshops, panel discussions and roundtables that will provide you with an actionable plan on how to **accelerate your marketing transformation, utilize marketing insight and analytics, enable personalized engagement, optimize creative processes with GenAI technologies, launch effective multichannel marketing campaigns** and much more.

Join us to **source best practices from market-leading brands like Prudential Financial, J.P. Morgan, Fidelity Investments, State Street, Columbia Threadneedle Investments and make lasting business connections** that will help you excel in your transformation journey.

We look forward to welcoming you into the DMFS community and hosting you this November!



Taya Prokopenko
Head of Content, Digital Marketing for Financial Services
Strategy Institute
Taya@strategyinstitute.com

“One of the best parts about events like this is actually getting to hear case studies, instead of the op-ed pieces that you can read about in a blog. Really seeing the strategy go through with the analytics and results has been very helpful for us.”

Lincoln Financial Group - Past Delegate



Why Attend?

- 1** **Benchmark and create a robust business strategy** that will result in sustainable customer growth
- 2** **Maximize ROI** through expertise-sharing on how to leverage the latest innovative technologies and practices
- 3** **Set up an effective organization**, empowered by data, tools and the right talent to achieve customer primacy
- 4** **Gain actionable insights** on how to stand out and grow in a crowded market
- 5** **Build relationships** with the most engaged and influential thought leaders in the industry
- 6** **Discover potential partners** that will help you take your business to the next level



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Agenda at a Glance

The DMFS New York Summit is the flagship edition of North America's most exclusive and longest-running digital marketing and growth event series designed for the needs of the financial services industry. Join us to discuss best practices on:

- 1 Empowering your business to make data-driven decisions to unlock the full potential of your marketing investments**
- 2 Building and scaling hyper-personalisation capabilities in the age of first-party data**
- 3 Enabling an agile marketing organization and structuring empowered teams to respond to real-time business and consumer needs**
- 4 Re-establishing the value of marketing as a growth centre vs cost centre and aligning your business for digital growth**
- 5 Analysing most impactful GenAI use cases and moving them through pilot and execution stage**
- 6 Orchestrating omnichannel marketing campaigns and continuous customer experience**
- 7 Enabling sales and business development teams through content, automation and AI-powered tools**
- 8 Scaling content creation abilities and measuring content effectiveness across channels**
- 9 Adapting to the future of SEO, SEM and paid media to maintain reach and engagement**
- 10 Making better data-driven decisions rooted in strong attribution strategies and insight maturity**



NEW WORKSHOPS



AGILE MARKETING STRATEGY

Enabling Capacity Scaling Through an Agile Marketing Setup.



MARTECH STACK Maturity AND OPTIMIZATION

Moving Your Organization to the Next Step of Your Martech Maturity to Optimize Value.



EXPERIENCE NARRATIVES" DESIGN THINKING METHODOLOGY

Develop a Holistic Guided Client Experience Full of Omnichannel Automated Nurture Messaging.



USING DATA TO SHRINK THE AUDIENCE BULLSEYE

Using Company, Customer, Channel, and Contextual Data to Multiply the Impact of Marketing



NEW ROUNDTABLES INCLUDE



WEBSITE AI BOTS

Effectively Integrating Website Chatbots to Drive Conversion, Customer Engagement, and Brand Experience.



BITE-SIZED VS LONG-FORM CONTENT

Boosting Engagement Through Short Video Formats and Tying Vanity Metrics into Growth and Business Impact.



BEST TIPS ON META AND LINKEDIN MARKETING

What Can the Financial Services World Learn from Influencers?



DOING MORE WITH LESS

Leveraging Existing Resources to Attract More Customers Today.



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Who Attends

Network with senior peers from North America's top financial brands:



Marketing

C-Suite/SVP/VP/Director/ Manager of:
Marketing Operations, Marketing Strategy, Digital Marketing, Customer/Client/Consumer Engagement, Social Media, Content, Brand, Media, Communications, Creative, Advertisement, Product Marketing, SEO, SEM, Growth



Customer Experience

C-Suite/SVP/VP/Director/ Manager of:
Customer/Client Experience, Customer Insight & Analytics, Customer Journey



Digital

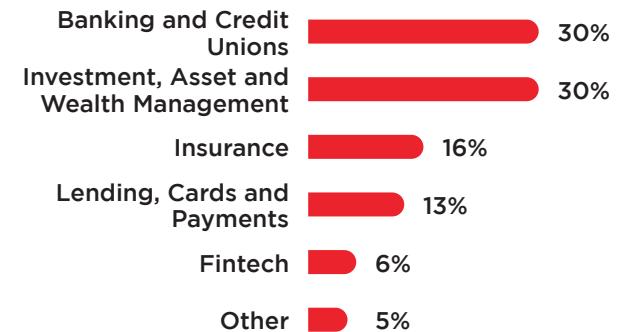
C-Suite/SVP/VP/Director/ Manager of:
Digital Transformation, Digital Strategy, Digital Innovation, Digital Experience, Digital Distribution, Digital Product, Personalization.



Data Analytics & Insights

C-Suite/SVP/VP/Director/ Manager of:
Marketing Analytics, Customer Insight

Market Segment



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Chief Marketing Officer
Northwestern Mutual



Jennifer Ball
Chief Marketing Officer
Franklin Templeton



Henry Detering
Chief Marketing Officer
Neuberger Berman



Walter Agumbi
Managing Director,
Global Head of Content &
Product Marketing
Goldman Sachs



Judy Edelson
Chief Marketing Officer
Apple Bank



Lisa Zakrzewski
Chief Marketing Officer
Leverage Retirement



Andy O'Rourke
Chief Marketing Officer
Direxion



Jeff Biesman
Chief Marketing Officer
National Debt Relief



Dwight Flenniken
Chief Marketing Officer,
Executive Vice President
Sunwest Bank



Riham El-Lakany
Former Chief Marketing
Officer at
BJC Healthcare,
Freddie Mac and Marsh



John Renz
Vice President, Head of
Creative, US Businesses
Prudential Financial



Martiña Gago
Senior Vice President,
Head of Content
Strategy, Personal
Banking & Wealth
Management
Citi



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Mitch Rose
Executive Director,
Digital Strategy - Content
J.P. Morgan



Julienne Redmond
Vice President
Fidelity Investments



Jill Perlberg
Vice President, Content &
Client Marketing
Northwestern Mutual



Abel Flint
Vice President, Brand
Marketing Lead - J.P.
Morgan Payments
JPMorgan Chase & Co



Cameron Hood
Vice President, Head
of Editorial – Payments
Marketing
JPMorgan Chase & Co



Alex Hachey
Vice President,
Director of User
Experience Design
T. Rowe Price



Matt Lesle
Managing Director,
Global Head of Digital
Product
**J.P. Morgan Asset
Management**



Sara Rosenbaum
Assistant Vice President,
US Brand, Creative &
North American
Citizenship Marketing
TD Bank



Victoriya Smith
Senior Vice President,
Senior Compliance
Officer, ICRM
Citi



Emily Childers
Head of Growth
Marketing
Credit Karma



Jeff Coghan
Senior Vice President,
Digital Marketing
Hartford Funds



Donna Jermer
Executive Vice President,
Chief Marketing Officer
Insuritas



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Scott Spidell
Vice President,
Strategic Marketing
**First Command
Financial Services**



Lara Coleman
Executive Director,
Advertising & Content
Marketing
FS Investments



Kaitlyn Crowder
Vice President,
Marketing Director
North Avenue Capital



Candis Curd
Director of Digital
Strategy &
Transformation,
GenAI & Emerging
Technologies
Unum



Allison Knightly
Marketing Director, Head
of US Paid Media
**Columbia
Threadneedle
Investments**



Keith Gerr
Director, Digital Channel
Strategy
Mutual of Enumclaw



Emily Stewart
Director, Digital Market-
ing & Analytics, Growth
Strategies
Meritrust Credit Union



Mark Reese
Marketing Director
Tri-Merit



Amber Wuollet
Director of Product
Marketing
Curi



Kristen Carloni
Global Head of Business
Proposal Team, Aladdin
BlackRock



Katherine Lucas
Head of Marketing &
Commercialization
State Street



Mark McClusky
Head of Content
Harding Loevner



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Jennifer Taylor
Head of Digital,
Commercial Bank
Axos Bank



Rachel Bourne
Head of Bank
Partnerships
MaxMyInterest



David Blackburn
Former Executive
Director, Head of Digital
Marketing
ProShares



Tim Hines
Fractional Chief
Marketing Officer
**Marketing Starter
Group**



Danielle Darling
Financial Advisor
LPL Financial



Rick Lake
University Lecturer,
Questrom School of
Business
Boston University



David Master
Former Chief Marketing
Officer
Janus Henderson
Investors



Stephen Diorio
Managing Director
**Revenue Enablement
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Industry Expert Speakers



Diego Lomanto
Chief Marketing Officer
Writer

WRITER



Callan Young
Chief Marketing Officer
ON24

ON24



Nasser Sahlool
Senior Vice President,
Client Strategy
DAC

DAC



Hastu Kshitij
Vice President of Growth
- North America
Moengage

moengage



Wayne Cichanski
Vice President, Search &
Site Experience
iQuantum

iQUANTUM



Samantha Goble
Vice President, Digital
XCentium

XCENTIUM



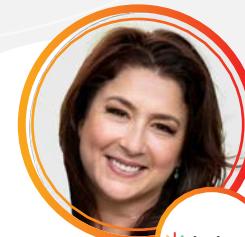
Alex Pavia
Regional Vice President,
Enterprise Sales
Demandbase

DEMANDBASE



Eric Feige
Managing Director,
Strategy
VShift

VSHIFT



Adit Hoenigmann
General Manager,
Enterprise Americas
Kaltura

kaltura



Tom Fricano
Executive Practice
Director of Strategic
Consulting
PossibleNow

PossibleNow
Customer, Preferences, Insights, Compliance



Shannon Sloan
Director, New Business
Development
Rich Media

richmedia



Jonathan Corley
Director of Experience
Strategy, Customer
Transformation
Sitecore

SITECORE



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Erika Whitestone
Financial Services Lead
**Dynamic Yield by
Mastercard**



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Meet the DMFS Advisory Board

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Donna Doleman Dickerson
Chief Marketing Officer
University of Michigan Credit Union



Andy O'Rourke
Chief Marketing Officer
Direxion



Donna Jermer
Executive Vice President,
Chief Marketing Officer
Insuritas



John Renz
Vice President, Head of Creative, US Businesses
Prudential Financial



Mitch Rose
Executive Director,
Digital Strategy - Content
J.P. Morgan



Kristi Daraban
Associate Vice President,
Marketing - Social Media
Nationwide



Erin Wilson
Vice President,
Marketing
HomeEquity Bank



Scott Spidell
Vice President, Strategic Marketing
First Command Financial Services



Marco Carrucciu
Vice President,
Marketing
TradeStation



Dan Moshkovich
Vice President,
Marketing
Chargeflow



LeAnita Ragland-Brooks
Former Managing Director & Vice President,
Strategic Relationship Management
Prudential Financial



Stephen Diorio
Managing Director
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KEYNOTE PRESENTATION: BUILD COMMUNITY CONTACTS

7:30 AM

WELCOME FROM THE EVENT DIRECTOR**Taya Prokopenko**

Head of Content, Digital Marketing for Financial Services,
Strategy Institute

8:30 AM

**OPENING REMARKS FROM THE CHAIRPERSON**

8:40 AM

KEYNOTE PRESENTATION: MARKETING TRANSFORMATION

9:00 AM

Unlocking the Value of Marketing to Drive Customer Experience and Growth Through Structural Transformation

Ensure your marketing organization endures with relevance and value through the waves of disruption. You'll walk away with an action plan on how to create a team fit for the future through:

- Identifying and harnessing the strengths of your existing marketing function.
- Creating bespoke organizational structures that reflect your marketing strategy and business model.
- Implementing digital and measurement initiatives in the face of imperfect enterprise data.
- Bringing together cross-functional problem-solving and collaboration.

Lynn Teo

Chief Marketing Officer
Northwestern Mutual

**KEYNOTE PANEL DISCUSSION: MULTI-CHANNEL MARKETING ATTRIBUTION STRATEGIES**

9:30 AM

Enabling Your Business to Make Better Connections Between Marketing Tactics and ROI

Accurately measure and optimize your marketing investment and campaign effectiveness considering multiple channels and touchpoints along the customer journey while avoiding common attribution pitfalls. Discover winning strategies, techniques, and tools to:

- Leverage attribution data to optimize marketing spend and drive business growth.
- Integrate multi-touch attribution models into your marketing analytics.
- Inform your marketing strategy decisions in scenarios where you don't have access to standard attribution data.

Empower your business to make data-driven decisions and unlock the full potential of your marketing investments.

Jeff Biesman

Chief Marketing Officer,
National Debt Relief

**Andy O'Rourke**

Chief Marketing Officer
Direxion

**Jeff Coghan**

Senior Vice President, Digital Marketing
Hartford Funds

**Emily Childers**

Head of Growth Marketing
Credit Karma

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INDUSTRY EXPERT PRESENTATION: PERSONALIZED VIDEO ENGAGEMENT

10:10 AM

Connecting with Your Customers on Their Journey from Acquisition, Conversion, Retention to Loyalty

As financial customers become more savvy, generic hypotheticals no longer speak to them. Capture your audience's attention at every step of their customer journey through personalized messaging. This session will provide guidance on how to:

- Connect with your customers on an emotional level to allow you to build relationships and goodwill.
- Capture and hold the attention of your customers throughout their decision-making process.
- Signal importance, helping to foster loyalty and word-of-mouth marketing.

Take your digital marketing to the next level and connect with your customers in a more genuine way by offering personalized videos.

Shannon Sloan

Director, New Business Development
Rich Media



SPEED NETWORKING

10:40 AM

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

11:00 AM



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Financial Services
Summit **NEW YORK**

A photograph of the New York City skyline at sunset, featuring the Empire State Building prominently on the right. The sky is a gradient of orange, pink, and purple. In the foreground, there is a large orange circular button with a white hand cursor icon pointing to the text "Register online now".

Speak at the
Digital Marketing for
Financial Services
Event of the year!

11:30 AM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

CASE STUDY: PERSONALIZED ENGAGEMENT STRATEGY

Creating a Multi-Channel, Personalized Client Engagement Ecosystem to Grow and Retain Your Client Base

- Analyze end-to-end client journeys and identify friction points that are optimal candidates for personalization.
- Identify client insights that can be used at scale to drive personalized engagement.
- Build tests that solve learning agendas as well as decision frameworks driving organizational change.

*Build an effective personalization strategy
and a team to drive business results.*

Julienne Redmond
Vice President
Fidelity Investments



TRACK B: THE FUTURE OF BRAND, MEDIA & CREATIVE

PRESENTATION: BRAND AND PRODUCT STORYTELLING IN THE AGE OF GENAI

Optimizing the Role of Generative AI In the Creative Process

- Use ChatGPT and other platforms as a powerful new tool for generating content.
- Manage associated risks and prevent harm to your brand.
- Establish quality standards and controls.

*Examine what's needed for brand
and product storytelling today, with
recommendations for getting better outputs
from generative AI.*

Mitch Rose
Executive Director,
Digital Strategy - Content
J.P. Morgan



TRACK C: WORKSHOPS

WORKSHOP 1: AGILE MARKETING STRATEGY

Enabling Capacity Scaling Through an Agile Marketing Setup

- Developing and curating an agile marketing team.
- Transitioning from waterfall to agile and “being agile” vs “doing agile.”
- Having more impactful conversations at the top level, powered by cost-value metrics.

*Deliver unprecedented business impact by
enabling marketing teams that can pivot
quickly to respond to real-time needs.*

Scott Spidell
Vice President, Strategic Marketing
First Command Financial Services



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12:00 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PANEL DISCUSSION: FINANCIAL SERVICES DIGITAL TRANSFORMATION

Leveraging Account-Based Strategies & Demandbase

Unlock the power of account-based strategies and the pivotal role they play in the successful digital transformation journey of financial services companies. In this panel, our experts will discuss real-life success stories and best practices on:

- Revealing buyer interests and needs
- Prioritizing and engaging key accounts
- Adopting new technologies to stay ahead of competition

Enhance your marketing strategies with proven best practices.

Led by:

Eric Feige

Managing Director, Strategy

VShift

VSHIFT

DEMANDBASE™

Alex Pavia

Regional Vice President, Enterprise Sales

Demandbase

TRACK B: THE FUTURE OF BRAND, SOCIAL & SEARCH

INDUSTRY EXPERT PRESENTATION: AI-POWERED SEARCH

Adapting for Greater Brand Discovery in an Evolving Landscape

Explore how AI is reshaping the way consumers discover brands online. This session will provide you with actionable guidance on how to:

- Adapt to algorithm changes
- Optimize your search presence
- Leverage AI-driven insights

Enhance your brand's visibility and discovery in an increasingly competitive search environment.

Nasser Sahlool

Senior Vice President, Client Strategy

DAC



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TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

CASE STUDY: THE JOURNEY TOWARDS CUSTOMER-CENTRIC MARKETING

Transforming Your Marketing Organization to Establish Trust, Increase Loyalty and Support Growth

- Utilizing data-driven personalization to tailor interactions and meet individual customer needs through advanced data analytics.
- Achieving organizational alignment by engaging employees and ensuring internal processes are aligned with customer-centric goals.
- Leveraging emerging technologies, such as AI, to innovate and enhance customer experiences, staying ahead of market trends.

Lisa Zakrzewski
Chief Marketing Officer
Leverage Retirement



12:30 PM

TRACK B: THE FUTURE OF BRAND, MEDIA & CREATIVE

FIRESIDE CHAT: CONSUMER ENGAGEMENT IN THE NEW GENERATION

Deciphering the Code to Performance Marketing in a Multichannel Multigenerational Environment

- Engage the millennial audience and expand into GenZ.
- Integrate offline, online, and owned channel strategies.
- Build trust with a younger audience through communities such as TikTok and Reddit.

Emily Childers,
Head of Growth Marketing
Credit Karma



01:00 PM

NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

TRACK A CONTINUED: MARKETING OPERATIONS & DIGITAL ENABLEMENT

TRACK B CONTINUED: THE FUTURE OF BRAND, MEDIA & CREATIVE

TRACK C CONTINUED: WORKSHOPS

2:00 PM

TRACK A CONTINUED: MARKETING OPERATIONS & DIGITAL ENABLEMENT

PANEL DISCUSSION: REPLACING THIRD-PARTY COOKIES

Setting Up for Hyper-Personalization Following the Age of Third-Party Data

- Developing and implementing first-party data strategies to maintain and enhance customer personalization.
- Leveraging customer insight and advanced analytics to predict customer behavior and tailor experiences.
- Ensuring compliance with evolving privacy regulations while delivering personalized marketing campaigns.

Jill Perlberg

Vice President, Content &
Client Marketing

Northwestern Mutual



Donna Jermer

Executive Vice President,
Chief Marketing Officer

Insuritas



Emily Stewart

Director, Digital Marketing &
Analytics, Growth Strategies

Meritrust Credit Union



TRACK B CONTINUED: THE FUTURE OF BRAND, MEDIA & CREATIVE

PANEL DISCUSSION: THE NEW REALITY OF CREATIVE AND MEDIA

Making Your Brand Stand Out in the Saturated and Overwhelming Multichannel Media Environment

Abel Flint

Vice President,
Brand Marketing Lead
- J.P. Morgan Payments

JPMorgan Chase & Co



Sara Rosenbaum

Assistant Vice President,
US Brand, Creative & North
American Citizenship Marketing

TD Bank



Martína Gago

Senior Vice President, Head of
Content Strategy, Personal
Banking & Wealth Management

Citi



2:00 PM

TRACK C CONTINUED: WORKSHOPS

WORKSHOP 3: "EXPERIENCE NARRATIVES" DESIGN THINKING METHODOLOGY

Develop a Holistic Guided Client Experience Full of Omnichannel Automated Nurture Messaging

- Strategically plan and automate "always-on" campaigns that deliver an omnichannel experience.
- Ensure your messaging resonates at every touchpoint.
- Discover the power of activation triggers and how to integrate them into your strategic documents for effective planning and execution.

Alex Hachey

Vice President, Director of
User Experience Design

T. Rowe Price



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2:45 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PRESENTATION: A MODERN APPROACH TO CUSTOMER JOURNEY ORCHESTRATION

Using AI to Improve Customer Experience and Customer Journey Orchestration

Elevate your approach by leveraging AI-driven customer journey orchestration to ensure every interaction is fresh and relevant to each customer. Source practical tips to:

- Activate customer journey data to deliver a personalized experience.
- Orchestrate omnichannel journeys.
- Optimize performance across channels and touchpoints.

Amplify your real-time decisioning tools to deliver personalized conversations at scale.

TRACK B: THE FUTURE OF BRAND, SOCIAL & SEARCH

INDUSTRY EXPERT PRESENTATION: CONTENT STRATEGY 2.0

Unlocking The Full Potential of Your Content Strategy

Elevate your brand's visibility and effectively engage with your audience in a rapidly evolving digital landscape. This session will share innovative approaches on how to:

- Uncover hidden opportunities within your existing content strategy.
- Tap into new channels and techniques to amplify your reach.
- Adapt to evolving content consumption trends across platforms and devices.

Wayne Cichanski

Vice President, Search & Site Experience

iQuanti

iQUANTI

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

3:15 PM

INDUSTRY VERTICAL BREAKOUT DISCUSSIONS

3:45 PM

Join vertical-specific marketing strategy and execution discussions to uncover how your peers are prioritizing marketing budgets, deciding their channel strategy, and transforming marketing operations.

1 BANKING

2 CREDIT UNIONS

3 INSURANCE

4 WEALTH MANAGEMENT & FINANCIAL PLANNING

5 INVESTMENT AND ASSET MANAGEMENT

6 FINTECH



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4:15 PM

TRACK A CONTINUED: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PRESENTATION: PERSONALIZATION AT SCALE

Delivering Personalized Experiences to Accelerate Financial Services Customer Engagement

Navigate the dynamic landscape of digital experience and customer expectations to forge innovative and meaningful connections with your customers. This session will guide you on how to:

- Adapt to evolving customer content preferences and leverage composable marketing technology to meet your customers' needs.
- Streamline content operations by centralizing assets and data, and create, test, and publish personalized content at scale.
- Focus on metrics that matter and scale personalization efforts.

Jonathan Corley

Director of Experience Strategy, Customer Transformation

Sitecore



TRACK B CONTINUED: THE FUTURE OF BRAND, MEDIA & CREATIVE

INDUSTRY EXPERT PRESENTATION: SOCIAL MEDIA LISTENING STRATEGY

Gain Competitive Advantage by Uncovering Invaluable Consumer Insights

Integrate social listening into your customer-centric strategy to enhance customer engagement and retention. Master the success factors to:

- Translating conversations into actionable business insight that drives revenue.
- Aligning your content and messaging with customer needs and market trends.
- Uncovering industry insights and customer sentiments.

4:45 PM

INDUSTRY EXPERT PRESENTATION: CONSENT & PREFERENCE DATA

Building Trust in a Privacy-Conscious Era

Consent and preference management is not just a regulatory necessity but a **strategic advantage for building long-term customer trust** and loyalty. Companies that master this will outperform competitors by earning customer trust while offering personalized, compliant experiences. This session will provide you with strategic insight on how to:

- **Unlock Seamless Personalization:** Utilize customer-provided insights to enable a harmonized omnichannel experience, ensuring every interaction is tailored, relevant, and aligned with individual customer preferences.
- **Build Trust Through Transparency:** Leverage consent and preference data to foster customer loyalty and trust, creating a privacy-first approach that resonates with today's cautious consumers.
- **Ensure Regulatory Compliance:** Discover strategies for maintaining compliance with evolving privacy laws while delivering personalized customer experiences.

Balance compliance with superior customer experiences through transparency and consent-driven personalization.

Tom Fricano

Executive Practice Director of Strategic Consulting

PossibleNow



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5:15 PM

ASSET MANAGEMENT SPOTLIGHT PANEL DISCUSSION: IS CONTENT KING?

Using Content as a Driver of Sales and Client Retention in the Asset Management Business

Explore the pivotal role of content in helping drive sales and client retention within the asset management industry, where the only tangible representation of a fund or strategy is through various forms of content. This panel discussion features three senior marketing leaders who will delve into:

- Perspectives on the strategic utilization of content and their approaches to content strategy.
- Structuring and leading content teams.
- The role of technology and AI in content creation, personalization, production and dissemination.

Discover how to effectively leverage content to enhance your sales efforts, build stronger client relationships, and stay ahead in the competitive asset management landscape and other B2B applications.

Jennifer Ball

Chief Marketing Officer

Franklin Templeton



Henry Detering

Chief Marketing Officer

Neuberger Berman



Walter Agumbi

Managing Director, Global Head of Content & Product Marketing

Goldman Sachs



Led by:

David Master

Former Chief Marketing Officer

Janus Henderson Investors



END OF DAY ONE SUMMARY & CLOSING REMARKS

6:00 PM

EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC & NETWORKING

6:05 PM



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DAY TWO REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

7:30 AM

LEADERS' CIRCLE (C-LEVEL INVITATION-ONLY SESSION)

8:00 AM

Reflecting on 2024 and Setting Strategic Priorities to Stay Ahead of the Evolving Technological Landscape

Don't miss this exclusive session designed for C-level financial services leaders. Bringing together 25 senior marketing and digital executives to drive organizational success and business impact in 2025. Take away specific solutions to:

- Identify the impact of key trends on fellow financial services CMOs and how that will shape their strategy going forward.
- Plan your next steps for delivering exceptional growth and customer experiences.
- Benchmark investment priorities and success metrics.

Riham El-Lakany

Former Chief Marketing Officer at

BJC Healthcare, Freddie Mac and Marsh

This is an invitation-only closed-door session. Please enquire for access to this session at taya@strategyinstitute.com.

DAY TWO OPENING REMARKS FROM THE CHAIRPERSON

8:50 AM

Tim Hines

Fractional Chief Marketing Officer

Marketing Starter Group



KEYNOTE PRESENTATION: TECHNOLOGY ENABLED CHANGE MANAGEMENT

9:00 AM

Building a Business Case and Momentum to Drive Change Within Your Organization

Unlock the potential of technology to spearhead transformative change within your organization. This keynote presentation will equip you with the insights and strategies needed to build a compelling business case and foster the momentum necessary for successful change management. You will walk away with advice on how to:

- Get your organization comfortable with innovation and identify how to prioritize transformation projects.
- Engage stakeholders and garner support around your vision.
- Think about change and risk-taking as a leader.

Amplify your ability to drive change and innovation to ensure your business remains dynamic and adaptable.



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9:30 AM

INDUSTRY EXPERT PRESENTATION: CUSTOMER TRUST AND LOYALTY**How Should You Approach Customer Trust to Build Deeper Relationships in a Cookie-Less World?**

Build customer trust through robust first- and zero-party data strategies, fostering a mutually beneficial value exchange between your brand and customers. Create a roadmap to:

- Cultivate relationships with customers centered around data and value exchange.
- Consolidate first-party data to create a comprehensive understanding of your customers and effectively target the right audience.
- Design meaningful personalized interactions to improve customer engagement and loyalty.

Optimize your data strategy to enhance customer trust and nurture long-term loyalty.

10:00 AM

PANEL DISCUSSION: AI-DRIVEN TRANSFORMATION**Driving Your Organization Towards Rapid and Responsible Exploration of AI Capabilities for Process Optimization, Scaling, and Customer Journey Improvements**

Discover how early adopters discern the most impactful business use cases, separating reality from hype and swiftly involving relevant internal stakeholders. Adopt best practices to:

- Navigate a use case from pilot setup to execution stage.
- Address privacy and bias concerns within internal teams and external customers.
- Identify opportunities to upskill your teams with AI-powered tools.

Transform your AI capabilities to unlock new levels of efficiency, innovation, and competitive advantage in your marketing strategies.

John Renz

Vice President, Head of Creative, US Businesses

Prudential Financial**Matt Lesle**

Managing Director, Global Head of Digital Product

J.P. Morgan Asset Management**Candis Curd**

Director of Digital Strategy & Transformation, GenAI & Emerging Technologies

Unum**Katherine Lucas**

Head of Marketing & Commercialization

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REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

10:40 AM

ROUNDTABLE DISCUSSIONS

11:10 AM

Break into smaller groups of approximately 10 industry peers to work through a series of questions and challenges to share knowledge on a particular topic that is most critical to your role and business.

A: WEBSITE AI BOTS: Effectively Integrating Website Chatbots to Drive Conversion, Customer Engagement, and Brand Experience.

Led by: **Keith Gerr**, Director, Digital Channel Strategy, **Mutual of Enumclaw**



B: BITE-SIZED VS LONG-FORM CONTENT: Boosting Engagement Through Short Video Formats and Tying Vanity Metrics into Growth and Business Impact.

Led by: **Amber Wuollet**, Director of Product Marketing, **Curi**



C: BEST TIPS ON META AND LINKEDIN MARKETING: What Can the Financial Services World Learn from Influencers?

Led by: **Danielle Darling**, Financial Advisor, **LPL Financial**



D: EMAIL MARKETING BEST PRACTICE: Innovating a Traditional Channel to Improve Engagement and Drive Conversion.

Led by: **Kaitlyn Crowder**, Vice President, Marketing Director, **North Avenue Capital**



E: DOING MORE WITH LESS: Leveraging Existing Resources to Attract More Customers Today.

Led by: **Rachel Bourne**, Head of Bank Partnerships, **MaxMyInterest**



F: RISK AND COMPLIANCE IN AI IMPLEMENTATION: When And How Should You Talk to Compliance and Governance Teams to Get Your AI Use Cases Off the Ground?

Led by: **Victoriya Smith**, Senior Vice President, Senior Compliance Officer, ICRM, **Citi**



G: UNLOCKING MARKETING EXCELLENCE: Building and Leading an Empowered Team for Success.

Led by: **Mark Reese**, Marketing Director, **Tri-Merit**



H: CREATING B2B CONTENT THAT RIVALS NETFLIX: Strategies to Dominate the Cluttered Digital Landscape.

Led by: **Abel Flint**, Vice President, Brand Marketing Lead - J.P. Morgan Payments, **JPMorgan Chase & Co**



Led by: **Cameron Hood**, Vice President, Head of Editorial – Payments Marketing, **JPMorgan Chase & Co**



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12:00 PM

TRACK A: DIGITAL INNOVATION & GROWTH

PANEL DISCUSSION: FINANCIAL SERVICES FOR THE NEXT GENERATION

Redefining Financial Services to Resonate with the Future Consumer Demographic

- Connect with the Gen-Z generation.
- Balance tradition and innovation.
- Refine your value proposition based on the younger generation's values.

Judy Edelson
Chief Marketing Officer
Apple Bank



Amber Wuollet
Director of Product Marketing
Curi



Jennifer Taylor
Head of Digital, Commercial Bank,
Axos Bank



Hastu Kshitij
Vice President of Growth -
North America,
Moengage



TRACK B: CONTENT STRATEGY

PANEL DISCUSSION: VIDEO CONTENT IN FINANCE

Best Ways to Leverage Video in 2025 to Boost Customer Engagement

- Scale video capabilities through partnerships and video-generating technologies.
- Identify the most impactful metrics and measurements to assess success.
- Interpret data to identify patterns, compare channels, and maximize engagement.

Allison Knightly
Marketing Director,
Head of US Paid Media
Columbia Threadneedle Investments



Kaitlyn Crowder
Vice President, Marketing Director
North Avenue Capital



Callan Young
Chief Marketing Officer
ON24



TRACK C: INTERACTIVE SESSION

WORKSHOP 4: USING DATA TO SHRINK THE AUDIENCE BULLSEYE

Using Company, Customer, Channel, and Contextual Data to Multiply the Impact of Marketing

- Improve the business impact of paid, owned, earned, and shared media.
- Allocate more resources to relevant and in-market prospects.
- Leverage the signal value of media response in owned marketing and sales channels.

Led by:
Stephen Diorio, Diorio, Executive Director,
Revenue Enablement Institute



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12:30 PM

TRACK A: DIGITAL INNOVATION & GROWTH

INDUSTRY EXPERT PRESENTATION: SIMPLIFIED PERSONALIZATION AT SCALE

Simplifying the Path to Personalization in Banking

- Identify the four main barriers to personalization and the simple strategies to break through them.
- Implement personalization initiatives without regulatory concerns or complex technology integrations.
- Enhance every customer interaction, fostering loyalty and gaining a competitive advantage through increased wallet share.

Erika Whitestone

Financial Services Lead

Dynamic Yield by Mastercard

dynamic yield
by 

TRACK B: CONTENT STRATEGY

INDUSTRY EXPERT PRESENTATION: CONTENT STRATEGY OPTIMIZATION

Create Content that Captivates Audiences, Builds Trust, and Drives Conversion Within a Highly Regulated Industry

- Craft content tailored to every stage of the customer journey.
- Measure content success across different stages of the customer journey.
- Embrace cutting-edge AI content creation tools to scale your content capabilities.

NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

1:00 PM

2:00 PM

TRACK A CONTINUED: DIGITAL INNOVATION & GROWTH

CASE STUDY: GROWTH THROUGH PARTNERSHIPS

Unlocking New Avenues for Business Growth and Enhancing Customer Value by Leveraging Strategic Fintech Partnerships

- Identify and evaluate a beneficial partnership.
- Develop collaborative strategies that integrate fintech solutions to enhance your product offerings and customer experience.
- Navigate regulatory considerations and manage risks associated with fintech partnerships to ensure compliance and trust.

Dwight Flenniken

Chief Marketing Officer & Executive Vice President

Sunwest Bank



TRACK B CONTINUED: CONTENT STRATEGY

CASE STUDY: PODCASTS AS AN EFFECTIVE MARKETING TOOL

Launching a Podcast in a World Where Everyone Has a Podcast

- Overcome the most common technical and business challenges.
- Navigate any budget.
- Define success measures.

Lara Coleman

Executive Director, Advertising & Content Marketing

FS Investments



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2:30 PM

TRACK A: DIGITAL INNOVATION & GROWTH

INDUSTRY EXPERT PRESENTATION: ACCELERATE YOUR TIME TO VALUE WITH COMPOSABLE MARTECH

Getting A Head Start on Your Digital Transformation

- Lower your TCO by paying only for what you need, avoiding unnecessary expenses on features or capabilities that aren't utilized.
- Accelerate your speed to market by gaining agility and flexibility to quickly adapt to market changes and customer needs.
- Increase efficiency by leveraging pre-built templates and modules that streamline your process.
- Future-proof for integration with new technologies thanks to the modular nature of composable that ensures easier and more cost-effective updates.

Samantha Goble

Vice President, Digital

XCentium

XCENTIUM

TRACK B:

INDUSTRY EXPERT PRESENTATION: LINKEDIN AS A POWERFUL CONTENT PLATFORM

The Most Effective Ways to Use LinkedIn as a Tool for Lead Generation and Customer Engagement

- Analyze high-performing content types on LinkedIn.
- Identify ultimate goals and tracking mechanisms.
- Engage employees and independent advisors to embrace LinkedIn.

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

3:00 PM

FIRESIDE CHAT: GROWTH LEADERSHIP

3:30 PM

Raising The Profile of Your Team as a Revenue-Generating Center

Elevate your team's role as a key driver of revenue growth. This session will provide you with actionable strategies on how to:

- Directly connect your team's role, remit and results to their impact on the revenues, profits, and the value of the customer relationship.
- Leverage technology, data, and AI to inform and enhance the quality, effectiveness, consistency, and compliance of your entire go-to market team.
- Work across product, marketing, sales, and response to improve the workflow, productivity, knowledge sharing, responsiveness and the customer experience of the revenue team.

Transform your marketing team into a recognized revenue-generating powerhouse within your organization.

Kristen Carloni

Global Head of Business Proposal Team, Aladdin

BlackRock

Led by:

Stephen Diorio

Managing Director

Revenue Enablement Institute

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by BlackRock

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CLOSING KEYNOTE PRESENTATION: CONTENT STRATEGY AND STORYTELLING

4:10 PM

Pushing the Boundaries of Your Brand to Increase Content Effectiveness for Modern Audiences

Elevate your content strategy by mastering the art of storytelling and adapting to the needs of modern audiences. In this presentation, you will draw from Mark's extensive experience bringing brands into their digital future and how the knowledge learnt can be effectively applied to the financial services industry, based on examples from Harding Loevner. Walk away with a blueprint on how to:

- Match your story to the most effective content form and platform, ensuring it resonates with your target audience.
- Maintain narrative consistency while telling the same story across multiple platforms.
- Produce timely and relevant content that aligns with how audiences consume information today.

Transform your content strategy to captivate modern audiences and drive meaningful engagement through powerful storytelling.

Mark McClusky
Head of Content
Harding Loevner



CLOSING REMARKS & END OF SUMMIT

4:40 PM

Tim Hines
Fractional Chief Marketing Officer
Marketing Starter Group



Taya Prokopenko
Head of Content, Digital Marketing for Financial Services
Strategy Institute



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Sponsorship Opportunities

Support North America's largest and scaling financial brands on their marketing transformation journey with your **technology solutions, strategic expertise and implementation experience.**

Showcase your brand and thought-leadership at the flagship event of the largest and longest-serving portfolio of digital marketing for financial services Summits in North America for more than 14 years.

Depending on your needs, the sponsorship packages can include:

- Speaking opportunities to demonstrate your brand's expertise
- Closed-door curated sessions for a selected group of participants
- Exhibition booths to facilitate networking and product demos

What our Sponsors have to say:

"We've participated both in Canada and the U.S. and will continue to do so ... Everyone here is someone who is very highly engaged in marketing, very highly engaged in digital, and they're all interested in getting to that next stage."

Hootsuite – Past Sponsor

For more information to discuss the different ways to get involved for your brand, please contact:



Darren Haughian
Sponsorship Director
Strategy Institute

Call: 1-866-298-9343 x 276

Email: darren@strategyinstitute.com

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6th Annual
Digital Marketing for
Financial Services
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Fall 2024

9th Annual
Digital Marketing for
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Summit **WEST**

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SPEAKER PRESENTATIONS:

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ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event

Super Early Bird In Person (Sep 27, 2024)	\$1,695 USD
Regular Price	\$2,095 USD

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New York Hilton Midtown

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VIRTUAL EXPO HALL:

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

SPEAKER PRESENTATIONS:

Take away PowerPoints and white papers addressing your biggest challenges

ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event

Super Early Bird Virtual (Sep 27, 2024)	\$1,195 USD
Regular Price	\$1,495 USD

GROUP RATES

To check if you are eligible for a group rate, please contact:



Sam Caskey

Delegate Relationships Manager - DMFS

Strategy Institute

sam.caskey@strategyinstitute.com

WELCOME

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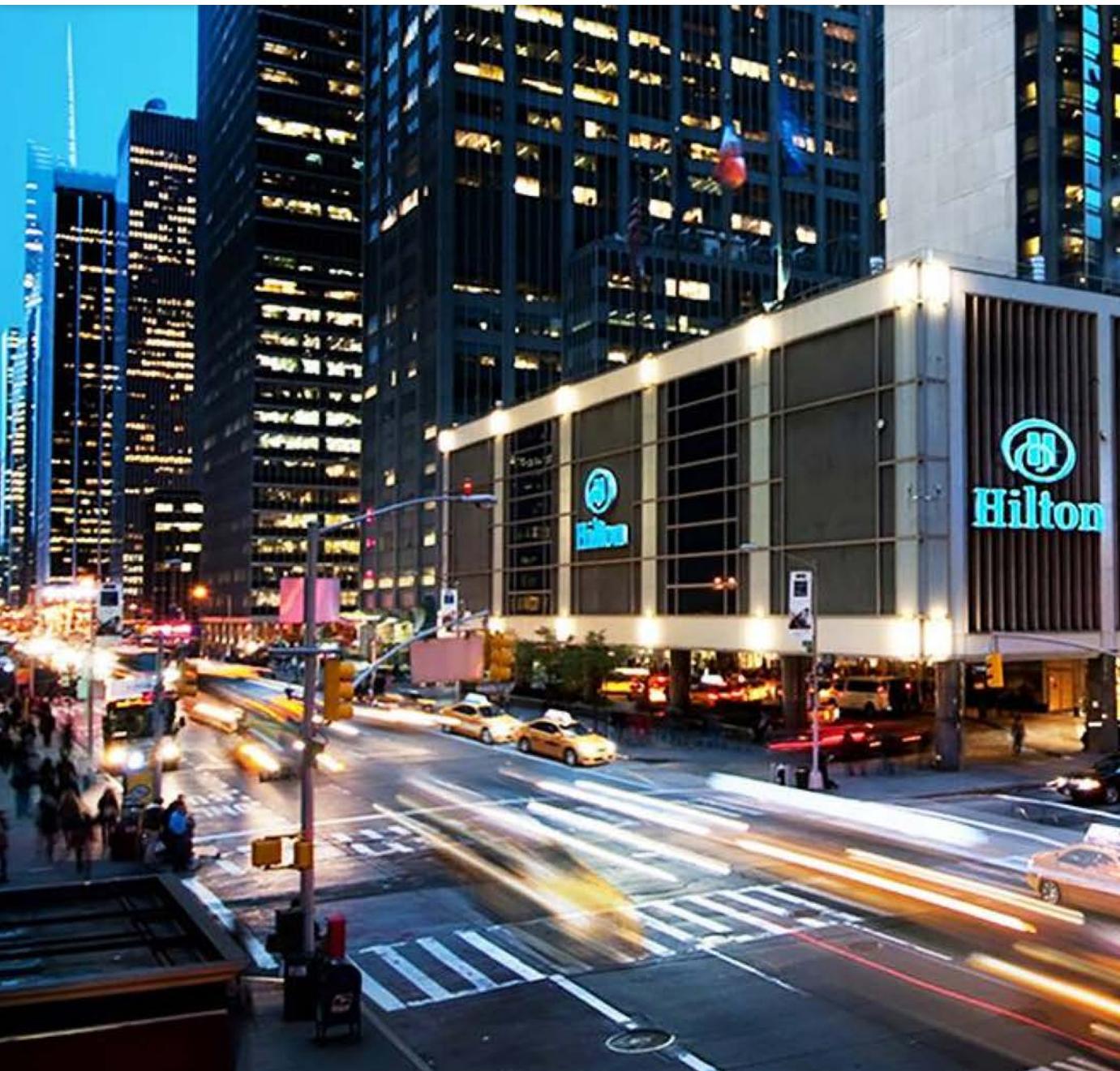
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