



12th Annual

Digital Marketing *for* Financial Services Summit

NEW YORK

2024
POST-EVENT
REPORT

NOVEMBER 6-7, 2025 | NEW YORK HILTON MIDTOWN, NEW YORK CITY, NY

WWW.FINANCIALDIGITALMARKETINGUS.COM

[#DMFSNY](https://twitter.com/DMFSNY)

The Digital Marketing & Financial Services New York Summit 2024 brought together marketing professionals from financial services and technology sectors to explore cutting-edge strategies in digital marketing, AI, and innovation. This premier event united senior executives, VP-level professionals, and industry leaders to discuss emerging trends, with a particular focus on artificial intelligence, personalization, and marketing technology.

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This was a great event. As financial services institutions navigate the speed of innovation. It's great to hear how industry leaders are working to solve complex problems.

Brandon Bess
Sr. Director of EFX Strategy
Northwestern Mutual

The 11th Annual Digital Marketing & Financial Services Summit New York 2024 brought marketing professionals and financial technology leaders together to explore transformative strategies in digital marketing, artificial intelligence, and innovative communication approaches. This dynamic event united industry experts from financial services, insurance, and technology sectors to examine the critical role of digital marketing in driving organizational growth and technological innovation.

Attendees delved into emerging trends through high-caliber sessions featuring senior executives and thought leaders, showcasing how AI, personalization, and advanced marketing technologies are reshaping digital engagement and corporate performance. The summit provided a comprehensive platform for networking, knowledge sharing, and discovering cutting-edge insights that enable companies to navigate the rapidly evolving digital marketing landscape, with a particular emphasis on leveraging technology to create more meaningful and effective marketing strategies.

▶ Event Objectives

- To advance understanding of digital marketing strategies and technological innovation in financial services
- Equip marketing professionals and organizational leaders with actionable insights on AI, personalization, and emerging marketing technologies
- Foster cross-industry networking and knowledge exchange among digital marketing and financial technology professionals
- Explore emerging trends in digital marketing, artificial intelligence, and data-driven communication strategies
- Provide a platform for senior executives to share best practices in leveraging technology to enhance marketing effectiveness and customer engagement
- Showcase innovative approaches to digital transformation in marketing across financial services, insurance, and technology sectors
- Facilitate strategic discussions on the future of marketing technology and its impact on organizational growth and customer experience

▶ Attendee Benefits

- Participants gained comprehensive insights into cutting-edge digital marketing strategies, discovering innovative solutions to complex marketing and technological challenges
- The summit delivered over 15 hours of expert-led content, including: AI and personalization technology sessions, martech innovation panels and digital marketing strategy workshops
- Attendees connected with top marketing professionals from financial services, technology, and insurance sectors, positioning themselves at the forefront of digital marketing innovation
- Opportunity to learn from senior executives representing organizations like JP Morgan, Credit Karma, and leading financial services enterprises
- Access to strategic insights on: artificial intelligence in marketing, digital transformation strategies, emerging marketing technologies & cross-industry digital engagement approaches

KEY STATS

2024 POST-EVENT REPORT



204

Total Attendees



41

Speakers



15+

Hours of Content



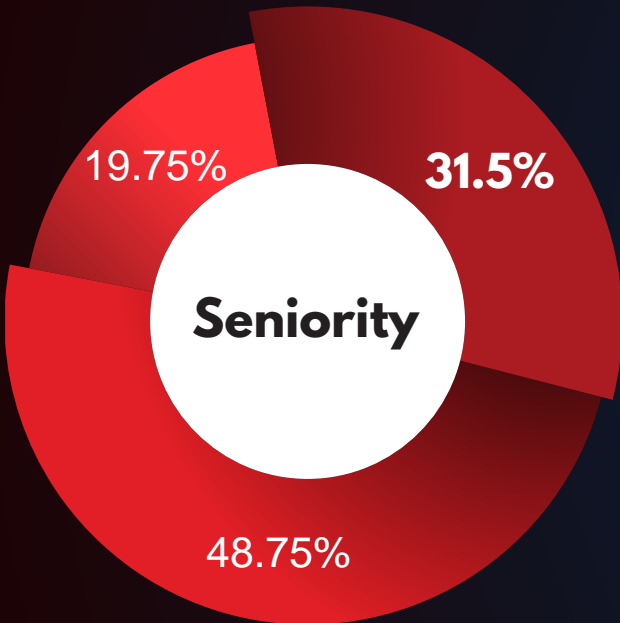
4+

Networking Hours

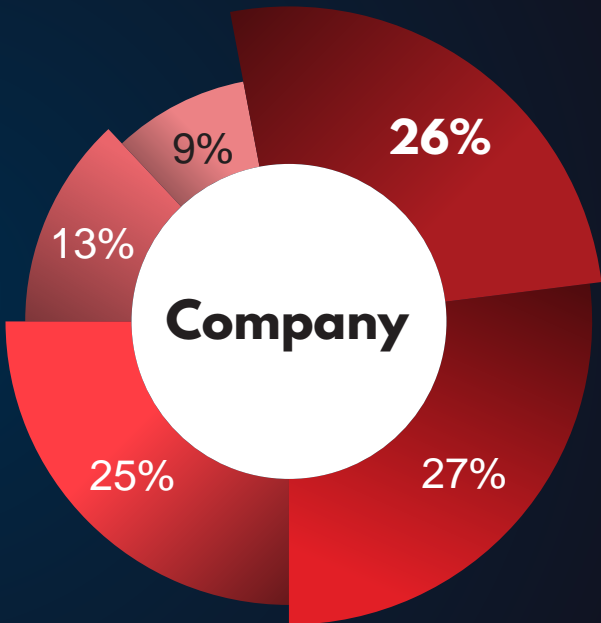


15

Sponsors



- 31.5% C-Suite & VP
- 48.75% Director & Head of
- 19.75% Manager & Specialist



- 26% 5,000+ employees
- 27% 1,001 – 5,000 employees
- 25% 201 – 1,000 employees
- 13% 50 – 200 employees
- 9% Under 50 employees

Key Metrics

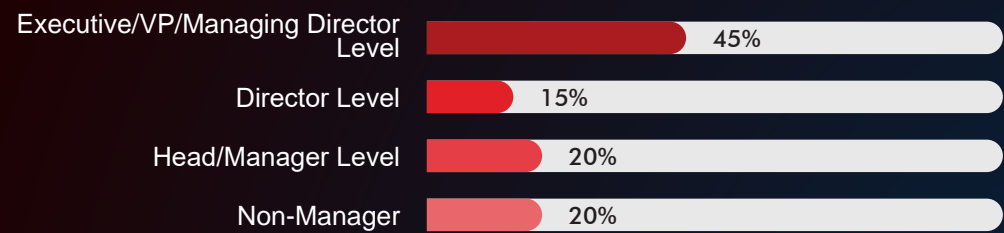


64.5%
of attending companies
generate \$100M+ in revenue



60%
of attending companies
have 1,000+ employees

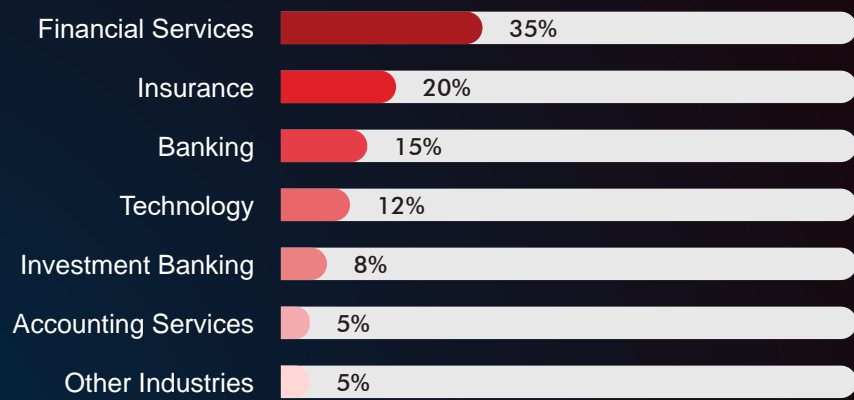
Attendee Roles and Seniority



Roles:

The high percentage of senior leadership (45% at executive/VP level) demonstrates strong appeal to strategic marketing decision-makers. The diverse seniority breakdown indicates comprehensive organizational representation.

Industry Representation



Attendee Characteristics



The attendee profile reflects a comprehensive cross-section of financial services and technology organizations committed to advancing digital marketing and technological innovation strategies.

Geographic Representation

- Primarily from New York
- Significant representation from other U.S. states
- International attendees from Europe and Asia

2024 DMFS NEW YORK SUMMIT: INDUSTRY REPRESENTATION & ATTENDEE INSIGHTS

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The 11th Annual Digital Marketing & Financial Services Summit New York 2024 attracted a strategic mix of industries, ensuring sponsors, speakers, and delegates engaged with key decision-makers in digital marketing, technological innovation, and financial services transformation. The event brought together a sophisticated network of marketing professionals from financial services, technology, insurance, and emerging sectors, creating a dynamic platform for exploring cutting-edge strategies in AI, personalization, and digital engagement.

Industry Breakdown:

- Financial Services (35%): Marketing leaders from banking, investment firms, insurance, and financial technology with strong representation of digital transformation and AI strategy professionals.
- Technology (20%): Tech companies showcasing cutting-edge marketing technologies, AI applications, and innovative digital engagement strategies.
- Insurance (15%): Marketing and digital strategy professionals exploring personalization techniques and emerging marketing technologies.
- Banking (12%): Financial institutions focusing on digital marketing innovation, customer experience, and technology-driven marketing approaches.
- Investment Banking (8%): Strategic marketing professionals examining data-driven marketing and technological integration strategies.
- Accounting Services (5%): Marketing teams exploring digital transformation and technology adoption in professional services.
- Other Industries (5%): Diverse sectors including payments, fintech, and emerging technology firms interested in advanced marketing strategies.

Key Insights:

- Comprehensive cross-section of financial services and technology industries
- Strong representation from large national enterprises (56% of attendees)
- Diverse perspectives on digital marketing and technological innovation
- Balanced mix of strategic leaders (45% executive/VP level) and professionals
- Significant focus on emerging technologies, AI, and personalization
- Cross-industry knowledge exchange on marketing strategy
- Demonstrated critical importance of digital transformation
- Highlighted strategic imperative of technology-driven marketing approaches.

Industry Standard:

As digital marketing evolves and organizations prioritize technological innovation, companies are investing in comprehensive marketing transformation strategies across all levels. DMFS-NY 2024: Collaborative

Learning Approach:

- 35% of attending companies sent multiple representatives
- 20% of organizations strategically divided delegates across different session tracks

Seniority Breakdown:

- Executive/VP/Managing Director Level (45%): Strategic decision-makers driving digital marketing innovation and technological transformation
- Director Level (15%): Senior leaders implementing advanced marketing strategies and technology integration
- Head/Manager Level (20%): Operational professionals executing digital marketing initiatives
- Non-Manager Roles (20%): Emerging marketing talent bringing innovative perspectives on technological advancement

Key Characteristics:

- Strong representation of senior marketing executives
- Diverse perspectives across organizational levels
- Focus on cutting-edge digital marketing strategies
- Emphasis on AI and technological innovation

2024 DMFS NEW YORK SUMMIT: INDUSTRY REPRESENTATION & ATTENDEE INSIGHTS

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Key Collaborative Insights:

- Diverse representation ensures comprehensive digital marketing knowledge sharing
- Multi-level participation promotes integrated learning across marketing technologies
- Organizations demonstrating commitment to digital transformation and innovation
- Strategic approach to marketing strategy across organizational hierarchical levels

Key Collaborative Highlights:

- 45% executive/VP level participation
- Cross-industry technology and marketing insights
- Focus on AI and personalization strategies
- Emphasis on digital marketing innovations



The summit emphasized the critical importance of AI-driven marketing strategies. Organizations must prioritize leveraging machine learning technologies to create more intelligent, personalized marketing approaches. Investing in advanced marketing technologies is no longer optional but a strategic imperative for staying competitive in the digital landscape.

- 1. Digital Transformation:** Comprehensive digital transformation emerged as a key theme, highlighting the need for organizations to develop robust digital engagement strategies. Breaking down technological barriers across industries and creating data-driven marketing ecosystems will be crucial for future success. Companies must adopt a holistic approach to technological integration.
- 2. Personalization and Customer Experience:** Hyper-targeted marketing techniques took center stage, with a strong focus on utilizing advanced analytics to generate deeper customer insights. The ability to design personalized customer experiences through sophisticated technological tools was identified as a critical differentiator in the modern marketing landscape.
- 3. Cross-Industry Collaboration:** The event underscored the importance of knowledge exchange across different sectors. Professionals were encouraged to share innovative marketing approaches, explore emerging technological trends, and foster collaborative learning environments that transcend traditional industry boundaries.
- 4. Strategic Marketing Evolution:** A clear message emerged about the necessity of embracing technological innovation. Organizations must develop adaptive marketing capabilities, focus on continuous learning, and create skill development strategies that keep pace with rapid technological changes.
- 5. Content and Engagement:** Participants highlighted the need for high-quality, technology-focused content and more meaningful networking opportunities. There was a consensus on balancing session density with interactive experiences that provide genuine value to attendees.
- 6. Leadership and Innovation:** Senior leadership engagement in digital strategy was emphasized, with a call to promote cross-functional technological understanding. Executives were encouraged to drive organizational digital transformation from the top down, ensuring strategic alignment with technological innovations.
- 7. Emerging Technology Outlook:** The summit concluded with a forward-looking perspective on exploring AI applications in marketing, investigating martech innovation, and staying ahead of digital marketing trends.

The message was clear: continuous exploration and adaptation are key to future success.

KEYNOTE PRESENTATION: MARKETING TRANSFORMATION

Lynn Teo, Chief Marketing Officer at **Northwestern Mutual**

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 digitally enabled team structures that support innovation.
- Bringing together cross-functional problem-solving and collaboration.

Drive long-term resilience and growth through a digital and data-enabled organization.

INDUSTRY EXPERT PRESENTATION: AI-POWERED ADVANCED ANALYTICS

Deciphering Multi-Touch Attribution Complexities and Predicting Future Marketing Outcomes Through Analytics-Driven Optimization

Utilize AI-powered analytics tools to harness the power of data to drive growth, enhance customer engagement, and stay ahead of the competition. Leave this session empowered with practical tips on how to:

- Unravel intricate customer journeys to improve conversion attribution.
- Capture the true impact of each marketing touchpoint by leveraging AI algorithms.
- Accurately forecast future marketing outcomes Enable more informed decision-making and resource allocation to optimize your campaign performance, anticipate market trends, and stay ahead of the competition.

PRESENTATION: BRAND AND PRODUCT STORYTELLING IN THE AGE OF GENAI

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

Optimizing the Role of Generative AI In the Creative Process

- Use ChatGPT and other platforms as a powerful new tool for generating content.
- Use existing data in a more compelling way to enhance personalization.
- Optimize the placement of tools and data to maximize their capabilities. Master a roadmap for increasing personalization maturity in your organization to enhance your digital experience.
- Manage associated risks and prevent harm to your brand.
- Establish quality standards and controls.

CASE STUDY: GROWTH THROUGH PARTNERSHIPS

Dwight Flenniken, Chief Marketing Officer & Executive Vice President at **Sunwest Bank**

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

PANEL DISCUSSION: VIDEO CONTENT IN FINANCE

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

Kaitlyn Crowder, Vice President, Marketing Director at **North Avenue Capital**

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.

CONTENT STRATEGY AND STORYTELLING

Mark McClusky, Head of Content at **Harding Loevner**

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. Interpret data to identify patterns, compare channels, and maximize engagement.

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



Lynn Teo
Chief Marketing Officer
Northwestern Mutual



Henry Detering
Chief Marketing Officer
Neuberger Berman



Walter Agumbi
Head of Content &
Product Marketing
Goldman Sachs Asset
Management



Judy Edelson
Chief Marketing Officer
Apple Bank



Lisa Zakrzewski
Chief Marketing Officer
Leverage Retirement



Andy O'Rourke
Chief Marketing Officer
Direxion



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



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



Rejeesh Ramachandran
Senior Vice President,
Head of Marketing
Transformation
TD Bank



Jeff Wilson
Senior Vice President,
Head of Marketing
Citizens Bank



Martiña Gago

Senior Vice President,
Head of Content
Strategy
Citi



Mitch Rose

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



Jill Perlberg

Vice President, Content
& Client Marketing
Northwestern Mutual



Abel Flint

Vice President, Brand
Marketing Lead
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



Jacquelyn Reardon

Vice President, Head of
US Marketing
Franklin Templeton



Matt Lesle

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



Sara Rosenbaum

Assistant Vice President
TD Bank



Victoriya Smith

Senior Vice President,
Senior Compliance
Officer, ICRM
Citi

SPEAKERS

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Jacob Holtgrewe
Global Head of Digital
Marketing & Media
TIAA



Emily Childers
Head of Growth
Marketing
Credit Karma



Jeff Cohan
Senior Vice President,
Digital Marketing
Hartford Funds



Scott Spidell
Vice President,
Strategic Marketing
First Command
Financial Services



Lara Coleman
Executive Director,
Advertising & Content
Marketing
FS Investments



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



Allison Knightly
Marketing Director
Columbia
Threadneedle
Investments



Amelia Stephens
Director, US Retail
Marketing
Alliance Bernstein



Keith Gerr
Director, Digital
Channel Strategy
Mutual of Enumclaw



Emily Stewart
Director, Digital
Marketing & Analytics
Meritrust Credit Union

SPEAKERS

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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



Will Obre
Head of Marketing
& Communications,
Americas
AXA IM



Jeff Jones
Head of Digital
Marketing
AXA XL



Mark McClusky
Head of Content
Harding Loevner



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

The 11th Annual Digital Marketing & Financial Services Summit provided attendees with extensive networking opportunities designed to foster connections and collaboration among marketing, technology, and financial services professionals. The event created a dynamic environment for engagement through interactive sessions, roundtable discussions, sponsored booth interactions, and dedicated networking breaks. The summit created a collaborative platform where marketing professionals could explore emerging technologies, share insights, and build strategic relationships across industries, emphasizing the importance of professional connection in driving digital marketing innovation.

Networking Opportunities: DMFS-NY 2024 Networking

- **Breakfasts:** Each day began with an informal breakfast session, allowing attendees to connect with marketing professionals and industry leaders. These morning interactions provided opportunities for senior executives and emerging professionals to exchange insights and build initial connections.
- **Speed Networking Sessions:** Structured interactions enabled participants to engage in brief, focused conversations about digital marketing technologies, AI strategies, and industry innovations. These sessions facilitated rapid exchange of ideas and contact information among marketing professionals from diverse sectors.
- **Exhibitor Lounge:** Attendees explored sponsor booths showcasing cutting-edge marketing technologies, AI solutions, and innovative digital platforms. The exhibitor area fostered direct engagement between delegates and sponsors, enabling hands-on exploration of emerging marketing technologies.
- **Evening Reception:** An evening networking event provided a relaxed atmosphere for attendees to discuss session insights, share professional experiences, and build meaningful connections across financial services, technology, and marketing sectors.
- **Roundtable Discussions:** Interactive sessions encouraged participants to engage in thought-provoking conversations about:
 - AI and personalization strategies
 - Digital marketing innovations
 - Cross-industry technological approaches
 - Emerging marketing technologies

The 11th Annual Digital Marketing & Financial Services Summit provided attendees with a dynamic blend of professional networking and engaging social interactions.

From strategic morning connections to interactive sessions, participants experienced multiple opportunities to build meaningful relationships, exchange cutting-edge digital marketing insights, and strengthen cross-industry professional networks.



ATTENDING COMPANIES

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From innovative digital marketing teams to forward-thinking financial technology leaders, the attending companies of DMFS New York 2024 contributed to a dynamic atmosphere of technological collaboration and strategic insight. Attending Companies Included:



OUR ESTEEMED SPONSORS

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From innovative digital marketing teams to forward-thinking financial technology leaders, the attending companies of DMFS New York 2024 represented a powerful convergence of technological innovation, strategic vision, and cross-industry expertise. These organizations—spanning financial services, technology, insurance, and emerging sectors—created a dynamic ecosystem of digital transformation, where cutting-edge AI applications, personalization strategies, and marketing technologies were explored, challenged, and reimaged. Some of our sponsors included companies like:



DELEGATE TESTIMONIALS

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“

The Digital Marketing for Financial Services summit is an incredible opportunity to network with marketing industry experts. I've learned so much about how to leverage AI for content and strategies to evolve content that breaks through.

Maya Mahmud

Dr. Social Media Marketing Specialist
Shelterpoint Life Insurance Company

“

I thoroughly enjoyed this event. The subjects were well thought out, and the speakers were great. It wasn't too bank-heavy.

Cassie Burbine

Sr. Marketing Manager
Direxion

“

The sessions were relevant, interesting, and engaging. I liked the breakout sessions and thought the speakers were well-rounded.

Michelle Phan

Associate Director of Digital Marketing
Cambridge Associates

“

I learned so much at this event, very informative and engaging! I will not miss the next one.

Susy Camacho

Marketing Manager
Maxim Group

“

The summit was an educational and informative experience. A great resource for marketing professionals working in financial services.

Amina Fong

Marketing Coordinator
FS Investments

“

I love that everyone is familiar with financial industry struggles, and feels like there is something to relate to with every attendee.

Brittany Kiernan

Social Media Manager,
Mutual of America Financial Group

SPONSOR TESTIMONIALS

2024 POST-EVENT REPORT



The DMFS team put together an intimate event with many of our good-fit prospects and making it a valuable trip for our team to showcase our services.



There is no other event that brings industry leaders to the same room with high intent.



Great event, worth the time & investment by our team. Lots of strong influencers in the field to network in a close setting.



Thank you

TO OUR PARTNERS AND SPONSORS

We extend our heartfelt gratitude to the outstanding partners and sponsors of the 11th Annual Digital Marketing & Financial Services Summit. Your unwavering support transformed our event into a pivotal platform for marketing innovation, bringing together technology leaders, financial services executives, and digital strategy professionals.

Thanks to your contributions, we delivered groundbreaking insights into digital marketing transformation, fostered meaningful cross-industry connections, and created an environment for strategic knowledge exchange. The sponsors who participated not only showcased cutting-edge marketing technologies but also demonstrated a collective commitment to advancing digital strategies and AI-driven approaches. Your expertise elevated our discussions, facilitated critical networking opportunities, and pushed the boundaries of what is possible in digital marketing.

We are profoundly grateful for your passion, vision, and dedication. By supporting this milestone event, you have helped shape the future of marketing technology and digital transformation. Thank you for being an integral part of our journey.



REGISTER FOR 2025

We're excited to announce that the 12th Annual Digital Marketing & Financial Services Summit will take place in 2025!

Join us for an inspiring event featuring cutting-edge keynotes on AI, digital transformation, and marketing innovation. Experience interactive discussions and invaluable networking opportunities with top marketing executives, technology leaders, and financial services professionals.

Stay tuned for registration details and early bird pricing. Don't miss your opportunity to be part of the most innovative digital marketing event in the financial services sector!



PRE-SALE PRICING
In Person (MAY 30, 2025)

\$1,095 USD

REGISTER NOW ↗

[Download Past Delegate List](#) or
reach out to our Digital Marketing &
Financial Services Summit Team at:

Sam Caskey

Delegate Sales Associate

Email: sam.caskey@strategyinstitute.com