

A man with a beard and mustache, wearing a dark suit and a red and blue patterned tie, stands on the left side of the frame, gesturing with his right hand raised. He is facing a large audience seated at round tables in a conference hall. The audience is diverse and appears attentive. The room has a high ceiling with a large, modern chandelier. The overall atmosphere is professional and high-energy.

12th Annual

# Digital Marketing *for* Financial Services Summit

NEW YORK

## PAST ATTENDEE LIST

THE LARGEST AND LONGEST-RUNNING  
DIGITAL MARKETING FOR FINANCIAL  
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# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Accelerate Investors	Manager, Marketing
Advisors Asset Management Inc	Senior Manager, Digital Marketing
Advisors Mortgage Group LLC	Marketing & Business Development
Affinity Federal Credit Union	AVP, Digital Experience
Affirm	Marketing Analytics Manager
Affirm	Marketing Analyst
AIG	Former Head of Digital, U.S. & Canada at AIG
AirPlus International	Director of Marketing Communications
AirPlus International	Manager Marketing
ALANTRA	Vice President Business Development and Marketing
Alpine Capital Advisors	Associate
American Eagle Federal Credit Union	Assistant Vice President, Marketing
American Equity Investment Life Holding Company	Actuarial Specialist
American Express	Senior Manager, Advertising Measurement
American Express	Manager, People Based Marketing
American Express	Director, Enterprise Advertising Measurement Science
American Express	Director, People Based Marketing and International Media
American Express	Director, Digital Acquisition & Performance Marketing Analytics
Ameriprise Financial	Marketing Manager
Ameriprise Financial	Senior Manager, Paid Media
AmTrav	Chief Marketing Officer
AmTrust Financial Services	Chief Marketing Officer
Apex Quantitative Group	Quantitative Investment Strategist
Apple Bank for Savings	VP
Apple Bank for Savings	First Vice President, Assistant Marketing Director
Arkansas Federal Credit Union	Vice President, Marketing
Ascentium Capital	VP, Marketing
Associated Credit Union	VP of Marketing
Associated Industries of Massachusetts Mutual Insurance Company	Digital Marketing Specialist
Avestix Pty	CEO
Avestix Pty	Chief Operations Officer
Baldwin Risk Partners	Senior Director, Enterprise Digital Marketing

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Bank of America	Managing Director - Global Transaction Services
Bank of America	Supervisor
Bank of America	Director, Head of Engineering, Global Markets Risk Analytics
Banque Nationale Du Canada	Digital Strategist
Barclays	Messaging Engineer
Barclays	AML/ SAR Writer
Baycoast	Digital Production Manager
Bay first financial	Digital Banking Manager
Bayview Asset Management	Head of Marketing, Consumer Lending Fintech
Belite Capital	Senior Product Manager
Belite Capital	Managing Member
Belite Capital	Managing Director
Belrose Asset Management	Marketing Manager
Best Solutions Mortgage	Vice President / Managing Director
BitPay	Marketing Coordinator
Blackstone Inc.	Global Head of Marketing
Blackstone Inc.	Private Equity
Blackstone Inc.	Vice President Martech
Blue Ridge Wealth Planners	Managing Director
BlueChip Financial	Senior Marketing Analytics Strategist
BNP Paribas	IT Director
BNY Mellon	Product Team Lead, Digital Client Experience
Brown Brothers Harriman & Co.	Head of Marketing
CAIS Group	Director of Marketing Operations
Campbell Wealth Management	Engagement Program Manager Marketing
Capaccessadvisors.com	Chief Operating Officer
Capacity	Field Marketing Manager
Capital One	Sr. Distinguished Engineer
Capital One	Senior Director
Charugundla.com	Vice President, Marketing
Chase	Private Client Banker - Assistant Vice President
CHEQ	Senior Growth Consultant

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
CHEQ	Director of Demand Gen
CIBC	Senior Director, Marketing
CIBC	Executive Director
Citi	Director, Head of Real-time Decisioning & Innovation Lab
Citi	UXUI Designer
Citi	Vice President, Digital Acquisition Marketing
Citi	Vice President Copy Director
Citi	Head of Content Strategy
Citi	VP, Digital Products
Citi	Content Strategist
Citi	Vice President, Senior Innovation Portfolio Management
Citizens Financial Group	VP, Product Marketing Strategy (Credit Card & BNPL)
Clarion Capital	Managing Director, Investor Relations
Columbia Threadneedle Investments	Senior Manager, Paid Media
Conning & Company	Head of US Marketing
Cosgrove Associates	Vice President
Cosgrove Associates	Director
Crawford & Company	Vice President, North America Marketing
Crawford & Company	Brand Director, Global Marketing
Decentral Park Capital	Head of Research
Devji Wealth Management	Chief Financial Officer
Dotdash Meredith	VP of Measurement
Dotdash Meredith	Senior Director, Measurement Innovation
Doubleline Group LP	Content Manager
Dow Jones & Company, Inc.	Senior Vice President, Innovation and Technology Partnerships
Dow Jones & Company, Inc.	Senior Vice President, Performance Marketing
Dow Jones & Company, Inc.	Senior Vice President Brand Marketing
E-Trade Financial Corporation	Vice President
Edward Jones	Senior Strategist
Equifax	VP of Tech and Media Platforms
Equitable Holdings, Inc.	Senior Director
Equitable Life of Canada	Manager, Social Media

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Express Trade Capital	Marketing Manager
Farmersagency.com	Licensed Insurance Agent
Fidelity Bank	Digital Marketing Specialist
Financial Designs	Marketing Director
First County Bank	Mortgage Loan Originator
First Home Bank	SVP, Director of Marketing
First Level Capital	CEO
First Source Mortgage Corporation	Commercial Mortgage Underwriter
FIS Global	Strategic Business Systems Analyst
Fiserv	Senior Vice President Enterprise Marketing
Forbright Bank	Head of Marketing, Digital Banking
Freedomcapmkts	Vice President
Freedomcapmkts	Senior Vice President
Freedomcapmkts	President and Chief Executive Officer
Fulton Financial Corporation	Marketing Strategist
Georgia United Credit Union	Marketing & Community Development
Georgia United Credit Union	VP of Marketing
Goldman Sachs	Vice President
Goldman Sachs	Global Fraud ML + Innovation Leader   Product   Strategy   Risk Management   Sustainability
Golub Capital LLC	Senior Marketing Manager
Goodway Group Inc	Manager, Events& Promotions
Goodway Group Inc	Director, Business Strategy
Grayscale Investments LLC	Senior Associate
Great-West Lifeco	Associate Manager, Marketing
GSB	1st VP, Associate Director of Marketing
GSB	Digital Marketing Manager
Guardian	Senior MarTech Manager
Guardian	Head of Owned Channels
Harding Loevner	digital content associate
Harding Loevner	Senior Video Producer / Editor
Harding Loevner	Manager, Digital Content
HEM Financial Group	CEO & Founder

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Houlihan Lokey, Inc.	CMO
HSBC Bank Canada	Head- International, Customer Growth & Partnerships Wealth & Personal Banking
Icapital	Digital Marketing
ICE	Chief Marketing Officer
InvestiNet	Digital Marketing
Ivy Asset Group LLC	Director, Investor Relations and Markething
J.P. Morgan & Co.	Senior Associate
J.P. Morgan & Co.	Executive Director, Banker at J.P. Morgan Private Bank
J.P. Morgan & Co.	Marketing Director
J20 Ventures	Founder and Managing Director
JACK HENRY & ASSOCIATES, INC.	Senior Executive Vice President
Jovia Financial Credit Union	Assistant VP, Marketing
Jovia Financial Credit Union	Digital Marketing Manager
jpmchass.com	Associate-Private Credit Secondaries
JPMorgan Chase	Vice President
JPMorgan Chase	Vice President
JPMorgan Chase	Vice President
Kapitale	Chief Commercial Officer
Kapitus Servicing Inc	General Counsel
Kapitus Servicing Inc	Assistant General Counsel
Kapitus Servicing Inc	Financial and Digital Product Management
KeyBank	SVP, Business Technology Executive – Conversational AI Enterprise Delivery, KeyBank
Kotak Mahindra Bank	Executive Vice President
Lake Michigan Credit Union	Member Service Representative
Largo Financial Services	Founder & CEO
Laurel Road	Chief Marketing Officer
Levi & Korsinsky	Managing Partner
Liquidity Capital M.C Ltd	Marketing Director
Little Harbor Advisors	Managing Director
Lustella USA LLC	Social Media and Affiliate Manager Marketing
lyonswealth.com	CEO
M&T Bank Corporation	Commercial Credit Senior Underwriter, Middle Markets

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Marsh	SVP, Strategic Data Delivery, Derivation & Insight
Maspeth Federal Savings	Manager, Marketing
Maspeth Federal Savings	SVP Comptroller
Maspeth Federal Savings	Marketing Director
Maspeth Federal Savings	President & CEO
Maspeth Federal Savings	Senior Vice President & Chief Operating Officer
Maspeth Federal Savings	Social Media Supervisor
MassMutual	Financial Advisor
Mastercard	SVP Offers in Global Loyalty
Mastercard	Vice President, MOPS
Maybank	SVP, Head, Pricing & Data Analytics
Merchant One Financial LLC	Ceo
Merrill Lynch Canada	Relationship Manager
MetLife	Senior Vice President Marketing and CX
Miami Firefighters Insurance LLC	Senior Member Service
MissionSquare Retirement	Chief Marketing Officer
MissionSquare Retirement	Vice President, Digital Marketing and Analytics
MissionSquare Retirement	Marketing Operations
Mitsubishi UFJ Financial Group	Quality Control Analyst
Mizuho America	Vice President-US Head of Equity Valuations and Leveraged Capital Markets Valuations
Moneytms	President/Ceo
montaukpcc.co	Senior Manager, Strategy
Moomoo	Director, Public Relations
Morgan Stanley	Executive Director
Morgan Stanley	VP B2B Marketing
Morgan Stanley	Executive Director – Prospect Management and Client Coverage
Morgan Stanley	Vice President--Bank Oversight, Risk and Control--Core Markets
Morgan Stanley	Managing Director-CRM and Digital Martech
Morgan Stanley	AVP, LeadIQ/Coverage Central
Morgan Stanley	Executive Director, Morgan Stanley Wealth Management Digital Marketing
Morgan Stanley	Director of SEO
Morningstar	Global Head of Marketing

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Morningstar	Director of Demand Gen & ABM
Mortgage24	ceo
Movement Mortgage LLC	Regional Director, Marketing
Municipal Credit Union	Media and Digital Marketing Specialist
Mutual of America Life Insurance Company	VP, Digital Marketing & Social Media
Mutual of America Life Insurance Company	Senior Content Strategist
Mutual of America Life Insurance Company	Senior VP, Customer Experience Strategy
My Benefits	Marketing & New Business Specialist
myprimepayments.com	Vice President, Operations and Business Development
Mysafra	Chief Banking Officer
Nationwide	Consultant
Nationwide	Director, Social Media
Netspend	Head of Growth Marketing
Neuberger Berman LLC	Digital Marketing
New Jersey Manufacturers Insurance Company	Digital Marketing Strategist
New Start Capital LLC	President, Chief Executive Officer
New York Life	Registered Representative
New York Life	Financial Services Professional
New York Life Insurance	Financial Services Representative
New York Life Insurance Company	Director: Content Strategy, Planning and Management
NJM Insurance Group	Digital Marketing Strategy Leader
Nomura International plc	Project Manager
Northern Trust	Manager, Reg Marketing, Wlth Management
Northwestern Mutual	Campus Recruiter
Northwestern Mutual	Vice President of Client Experience
Northwestern Mutual	VP of Digital Marketing
Numerix LLC	Executive Vice President & Chief Marketing Officer
Numerix LLC	Vice President, Creative and Design
Oaktree Capital Management	Assistant Vice President, Corporate Communications
Old National Bank	SVP, Director of Digital Marketing Strategy
Optifino Inc	Chief Marketing Officer
Pacific Western Bank	VP, Commercialization, Treasury Management



# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Paradigm Asset Manag	President and Chief Executive Officer
PayPal	Head of Consumer Marketing
PayPal	Growth Lead
Paysafe	Senior Marketing Services Coordinator
Pelagic Capital	Managing Director
Penn Mutual Life Insurance Company	Avp, Product Marketing
Penn Mutual Life Insurance Company	Regional Marketing Manager, Field Marketing
PGIM Inc	Vice President and Global Creative Director
PNC	Product Management Associate
Prime, Buchholz & Associates	Sr. Marketing/Communications Associate
Produced by Monex Securites MENUWho we areContact us	marketing manager
Proezpay	President
Protego Trust	CIO
Prudential	Director, Product Owner
Prudential	Former Managing Director, Vice President of Enterprise Strategic Relationship Management
Prudential	Digital Marketing Manager
Prudential	Project Manager Scrum Master
Prudential	VP, Head of Creative
Public Yield Capital	Vp Business Development
Pythagoras Investments	CEO
Quantacred	Vice President, Marketing
Raisin GmbH	CMO & President
Raisin GmbH	Senior Manager, Paid Channels
Raymond James	Quantitative analyst
Red Ventures	Senior Director
Refinance.com	Ceo
Regimentsecurities	Managing Member
Riv Capital	Managing Partner
Rockefeller Financial LLC	Director of Marketing
Rocket Mortgage, LLC	Sr Multicultural Strategist
Rocket Mortgage, LLC	Associate Experience Designer
RSG Specialty LLC	E&S Underwriter

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
SBG Funding	CEO
SBG Funding	Senior Manager Marketing
Schroder Investment Management Limited	Digital Marketing Lead, Americas
Schroder Investment Management Limited	Head of Digital, Americas
Seamlesspay	ceo
SellYouMoney	President
SG CIB	Managing Director
Silicon Valley Bank	Sr. Product Marketing Manager - Digital Solutions
SIMON Markets	Managing Director
smcinvest.com	Client Relations Manager
Somar Capital Management	Managing Director, Business Development
State Street	Global Head Digital Asset and Technology Design
State Street Global Advisors	VP Digital
StoneCastle	SVP Marketing
StoneCastle	Digital/ Social Media Associate Marketing
Storyblok	Marketing Manager
Stride Bank	Chief Marketing Officer
Sun Life Assurance Company of Canada	Senior Manager, Marketing
Sun Life Assurance Company of Canada	Marketing Specialist
Sun Life Assurance Company of Canada	Director, International Life Marketing
Sunwise Capital	Chief Executive Officer
SUREFIRE FINANCIAL	President
Suttona Capital	Digital Manager
SWIFT KENNEDY & ASSOCIATES INC	Coordinator Marketing
Swiss Re	Senior Economist
TD Bank Group	Head of Product Growth and Analytics   Digital Platforms
TD Bank Group	Head of Product Growth & Innovation
TD Bank Group	Product Manager-Real Time Payments
TD Bank Group	Vice President, Enterprise Digital Strategy
TD Bank Group	SVP/EPO US Digital Channels
The Anything Loan Kompany	President
The London Company	Digital Marketing Specialist

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Tnacapital.com	Managing Partner
Tri-Merit	Marketing Specialist
Tri-Merit	Marketing Director
Tri-Merit	Marketing Associate
Turns Financing	CEO
UBS	Wealth Planning Specialist
UBS	Director of Digital Marketing
UBS	Social Media Specialist
UBS	Executive Creative Director
UM Credit Union	CMO
Unimor Capital	Operations Manager
US Bancorp	Executive Vice President, Chief AI and Analytics O
USF Federal Credit Union	Digital Marketing Manager
USLI	2nd Vice President, Director of Insurance Training and Educational Program Development
Van Eck Associates Corporation	Channel Marketing Manager
Vanguard	Martech Lead
Verizon	Senior Manager Integrated Marketing
Visa	Martech Lead
VShift	Creative Traffic Manager
Waypoint Investment Partners	Director of Operations
Webster Financial Corporation	Senior Managing Director
Webster Financial Corporation	Managing Director Digital Bank Growth Strategy
Webster Financial Corporation	Digital Acquisitions
Webster Financial Corporation	UX Lead, Digital Acquisitions Journey Management
Webster Financial Corporation	Managing Director of User Experience and Research
Webster Financial Corporation	Manager Email Marketing
WePad	Marketing Manager
Whittier Holdings Inc	Marketing Officer
Wild World Investments	President
Williams Trading LLC	Senior Managing Director
Wilmington Trust	Senior Vice President
WV Capital Holdings	Co Managing Partner

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
X-Caliber Capital	Chief Marketing Officer
1st Source Bank	Digital Marketing Specialist
5Point Credit Union	Member Experience Analyst
5Point Credit Union	Director of Community Development
5Point Credit Union	Community Development
ABLE Financial Group	Senior Marketing Specialist
Abound Credit Union	Marketing Manager
ACI Worldwide	Field Marketing Specialist
Acuity Advisors	Director of Marketing
Advantage Capital	Content Manager
Affinity Credit Union	Web & Digital Communications Lead
Affinity Credit Union	Web and digital specialist
Affinity Credit Union	Marketing Advisor
Affinity Credit Union	Marketing Manager
Alterna Savings	Director Digital Marketing
Alterna Savings	Brand and Campaign lead
American Bankers Association	Sr. Director, Digital Marketing
AMPF	Marketing Director
Angel Oak Capital Advisors	Marketing Manager
Aprio, LLP	Segment Growth Leader, Healthcare & Nonprofit
arb.bank	Marketing Officer
ascadvisors	Senior Associate
Ascentium Capital	Digital Marketing Manager
Ascentium Spacemen	Direct Marketing Operations Manager
Assante Wealth Management	Marketing Coordinator
Assiniboine Credit Union	Digital Marketing Specialist
Association of Certified Anti-Money Laundering Specialists	Marketing Specialist
Assurance Risk Managers Inc	Creative Director
ATB Financial	Director Social Media
ATB Financial	Director, Marketing and Communications
ATB Financial	Marketing & Influencer Specialist
Atlantic Carolinas Title LLC	Senior Marketing Editor



# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Atlanticus Holdings	Marking manager
Aviso Wealth	Sr Manager
Banque Nationale Du Canada	Digital Partnerships Lead
Bay Federal Credit Union	SVP, Chief Marketing Officer
BCAA	Director, Membership
Bee Finance	SVP
Berger Financial Group Inc	Marketing Director
Besselman Wealth Planners	Director of Marketing and Client Services
BLAYLOCK VAN	SVP - Capital Markets
Bloomberg LP	Content Strategist
Bloomberg LP	content strategist
Bloomberg LP	Digital Strategist
Bloomberg LP	Content marketing
Bloomberg LP	Digital Marketing Strategist
Blue Trust	Digital Manager Marketing
BlueShore Financial	Marketing
Bramshill Investments LLC	Associate
Bromwich+Smith	PR Communications
Cabrera Capital	Communications Specialist
Calvert Home Mortgage Investment	Marketing Associate
Camber Private Wealth	CD
Cambridge Associates LLC	Associate Director, Digital Marketing
Campus Federal	Marketing Research Specialist
Canaccede Financial Group Ltd	Marketing and Sales Coordinator
Capital Credit Union	Senior Digital & Product Marketing Specialist
Cashco Financial	Chief Brand Officer
CBB Bancorp, Inc.	AVP, Marketing Officer
Central 1 Credit Union	Sr. Manager
Ceto	marketing director
Citizens Bank & Trust Company	Loan Admin/Marketing Specialist
Clearwater CU	Digital Marketing Specialist
Coloramo Federal Credit Union	Marketing Coordinator

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Commercial Credit Group Inc	Marketer
Community Service Credit Union	CFO
Conexus Credit Union	Marketing Specialist
Conexus Credit Union	Senior Marketing Analyst
Conexus Credit Union	director growth marketing
Conexus Credit Union	Marketing Coordinator
Conexus Credit Union	VP Member Experience
Conexus Credit Union	Marketing Advisor
Connect First	Marketing Automation Advisor
Connexus Credit Union	Director, Digital Banking
Corporate Investment	VP, Head of MARKETING
CWB Wealth Management	Marketing Specialist
Dentsu	Associate Director, Affiliate Marketing
Dentsu	Senior SEM Analyst
Deutsche Bank AG	Vice President
Discover	Senior Manager Digital Analytics
DJB	Marketing Coordinator
Edge One	Marketing Manager
EDUCATIONAL EMPLOYEES CREDIT UNION	Asst Manager
Equitable Life of Canada	Digital Content Specialist
Everence Services, LLC	Digital Marketing Manager
Evergreen Home Loans	Chief Marketing Officer
Excite Credit Union	Marketing
Export Development Canada	Marketing
Export Development Canada	Sr. Associate, Mid-Market Growth Capital
Export Development Canada	Lead Data Scientist
Fairstone Financial	Senior Manager, B2B Marketing
Fairstone Financial	Marketing Specialist
Fairstone Financial	Marketing Analyst, Retail Financing
Fairstone Financial	Senior Marketing Manager
Fairstone Financial	Marketing Specialist
Falcon International Bank	Marketing Officer

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Farm Lending Canada	Marketing Manager
Fidelity Investments Canada	Digital Creative and Media Strategist
First Commerce Credit Union	Marketing Manager
First Merchants Corporation	CMO
First National Bank Bemidji	Marketing Manager
First Nations Market Housing Fund	Marketing & Communications Specialist
Forward Community Investments	Director of Marketing & Communications
Fourthought Private Wealth	director of marketing
Generations Federal Credit Union	SVP of Operations
Green Country Federal Credit Union	VP Marketing
groupealesco.ca	Marketing Director
gt.ca	Marketing Manager
Guavapay	Content marketer
Gulf Credit Union	AVP of Operations
Harpswell Capital	Director Marketing
IBC Bank	Corporate Marketing Coordinator
IEQ Capital LLC	Chief Client Officer
IEQ Capital LLC	Director of Marketing
IGM Financial	Manager, Agile Practice, Digital Marketing & Performance
IGM Financial	Product Manager
Impact! Partners Financial	Vice President of Marketing
Impax Asset Management Group plc	Director, Europe & APAC Channel Marketing
Innovative Lease Services Inc	CEO
Investments+Wealth	Communications Manager
Investors Trust	Media & Communications Manager
Issmarketintelligence	Assoc VP, Email Marketing
Issmarketintelligence	Email Marketing Manager
J.P. Morgan & Co.	Brand Marketing
J.P. Morgan & Co.	VP
John Hancock Retirement Plan Services	Senior Marketing Manager
Johnson Bixby	Marketing Specialist
Kapcharge by Kapital Solutions	Marketing Manager

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Kinecta Federal Credit Union (KFCU)	Marketing
KMI Brokers Inc	Broker & Marketing Associate
LAFCU	Marketing
LAFCU	Creative Director
LAFCU	Digital and Graphic Designer
Lane Health	Director of Lifecycle Marketing
Lane Health	Seniro Director of Marketing
LAWLEY	Coordinator Marketing
LAWLEY	Sales and Manager Marketing
LAWLEY	Marketing Specialist
Legend Financial Marketing Services	Communications Manager
LendCare Capital	Marketing Specialist
Lincoln International	Digital marketing
Loans Canada	Content manager
Lockton	Senior Engagement & Wellbeing Consultant
Magnolia Federal Credit Union	Marketing Manager
Manulife Investment Management	Manager, Media Strategy
Manulife Investment Management	director
Manulife Securities	Marketing and Office Manager
Mariner Wealth Advisors	Director, Digital Marketing
Martin Investment Management	Director
Matco Financial Inc	Digital Marketing Specialist
Matco Financial Inc	CFO
Mend Auto Loans	FINANCE MANAGER
miaxglobal.com	Marketing Manager
Money Mentors	Marketing and Communications Manager
Nationwide	Marketing Management Specialist
Natixis	Avp, Marketing Consulting
Natixis	VP Marketing Technology
Northwestern Mutual	Sr Director Digital Product
Northwestern Mutual	Financial Representative
Northwestern Mutual	Sr. Director, Field Marketing



# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Nuvative	President
Nuvative	Marketing Director
NW Priority Credit Union	Digital Marketing Specialist
Orbit Insurance Services	Marketing Content Specialist
Osterweis Capital Management	Marketing & Communications Coordinator
Palliser Insurance	Marketing Coordinator
Parda Credit Union	Marketing Manager
PaymentEvolution	Marketing Coordinator
Peoples Bank	SVP/Marketing
Peterson Wealth Advisors	Marketing Specialist
Polen Capital Management, LLC	Marketing Analytics
PremierBank	VP/Business Development Officer
PreserverPartners, LLC	Marketing Associate
Prime Quadrant US LLC	Senior Manager, Digital Marketing
Primerica	SVP, Social Media & Public Relations
Prudential	Manager Marketing
Publix Employees Federal Credit Union	Social Media Content Developer
PWL Capital	HR Lead & Communications
Questrade	Senior Marketing Strategy Manager
Questrade	Director, Marketing Strategy
Radiant Credit Union	Member Marketing Specialist
RATESDOTCA	Director, Performance Marketing
RBC	Senior Growth Marketing Manager
RBC	Marketing Consultant
RBC	Senior Manager, Digital Marketing
RBC	Digital Strategy Director
RBC	Director
Rbcx	Sr Manager Marketing Analytics
Red River Mutual	Marketing Manager
Red River Mutual	Communications Specialist
Resource One Credit Union	COMMUNITY Engagement
Revenue Enablement Institute	director

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Sacramento Credit Union	Marketing Specialist
San Antonio Citizens Federal Credit Union	Director of Marketing
Sandstorm Gold	Marketing Specialist
Satrix Resi	Head of Brand & Marketing
Schneider Downs	senior marketing specialist
Scoop Insurance	Marketing Director
Scotiabank	Marketing Manager
Scotiabank	Research Manager
Scotiabank	Manager, enterprise growth and strategy
SECNY FCU	Director of Ed & Digital Marketing
SECNY FCU	Director of Education and Digital Marketing
SECURE RETIREMENT FINANCIAL & INSURANCE SERVICES	Investment Advisor Rep
Signal Financial FCU	VP Marketing
sixparkinvestment.com	Owner
South Carolina Student Loan	Director of Marketing & Outreach
SRP Federal Credit Union	Chief Development Officer
Star One Credit Union	Digital Marketing Manager
Stockman Bank	Digital Marketing Officer
Strategic Group	Director of Marketing
Sutherland Insurance	Marketing Lead
Synergy One Lending Inc	VP, Marketing
Tandem Investment Advisors Inc	Associate, Communications
TD Bank Group	Data Scientist III
TDECU Insurance Agency LLC	Senior Business Engagement Officer
Teamonecu	Marketing Specialist
Texas Bay CU	Marketing Manager
Texell Credit Union	Marketing Communications Specialist
The Canadian Bar Insurance Association	Advisor Marketing Associate
The Co-operators	Digital Marketing Lead
The Plexus Groupe	Marketing & Design Specialist
The Police Credit Union	Marketing Coordinator
TransGlobal Holding	Media Manager

# SAMPLE PAST ATTENDEE LIST

## 2025 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Travis Credit Union	Director
Tru	Digital Marketing Manager
Tru	Graphic Designer
True Link Financial	Director of Brand Marketing
Trust Point	Creative Brand Specialist
Trust Point	Marketing
Turtlefordcu	Marketing Officer
Union Bank & Trust	Digital Marketing Officer
United Super Pty Ltd	Social and Content Lead
Upbound Group	Director, Digital Media
Vk-Hardware	Marketing and Product Manager
Vk-Hardware	Marketing and Product Manager
VShift	Managing Director
Wealth Enhancement Group	Marketing Manager
WealthCo	Director of marketing
Weaver	Marketing Specialist
Welch	Marketing Specialist
Westcap	Technology Manager and Digital Specialist
Wilmington Savings Bank	Marketing/Business Development
Wind River Payments	Marketing Coordinator
Wright-Patt Credit Union	Senior Marketing Specialist
Ziffity	Senior Digital Manager
ZLC Financial	Marketing Coordinator
Zoobla Financial Inc	President

# Register

12th Annual

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In Person (MAY 30, 2025)

**\$1,095 CAD**

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3 People

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**Sam Caskey**

Delegate Relationships Manager -  
DMFS

**Strategy Institute**

sam.caskey@strategyinstitute.com