



DRIVING CUSTOMER GROWTH THROUGH IMPACTFUL DIGITAL MARKETING & EXPERIENCE STRATEGIES

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12th Annual

Digital Marketing *for*
Financial Services
Summit **NEW YORK**

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

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MESSAGE FROM THE PRODUCER

Dear Colleagues,

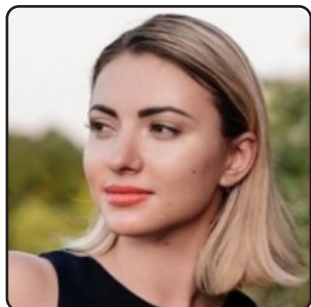
Welcome to the 12th edition of the Digital Marketing for Financial Services (DMFS) New York Summit! This edition is the North American flagship of the series, designed specifically to **cater to the unique challenges of financial marketing brands, products, and services.**

DMFS is attended by senior marketing leaders from across the broad range of financial services, including **banks, credit unions, insurance, wealth and investment management, lending, cards, payments services, and fintech.**

Our mission is to support and empower marketing and digital leaders to **make sense of fast-paced technological change and shifting consumer trends,** translating it into a robust business strategy that will drive growth and customer loyalty in the modern world.

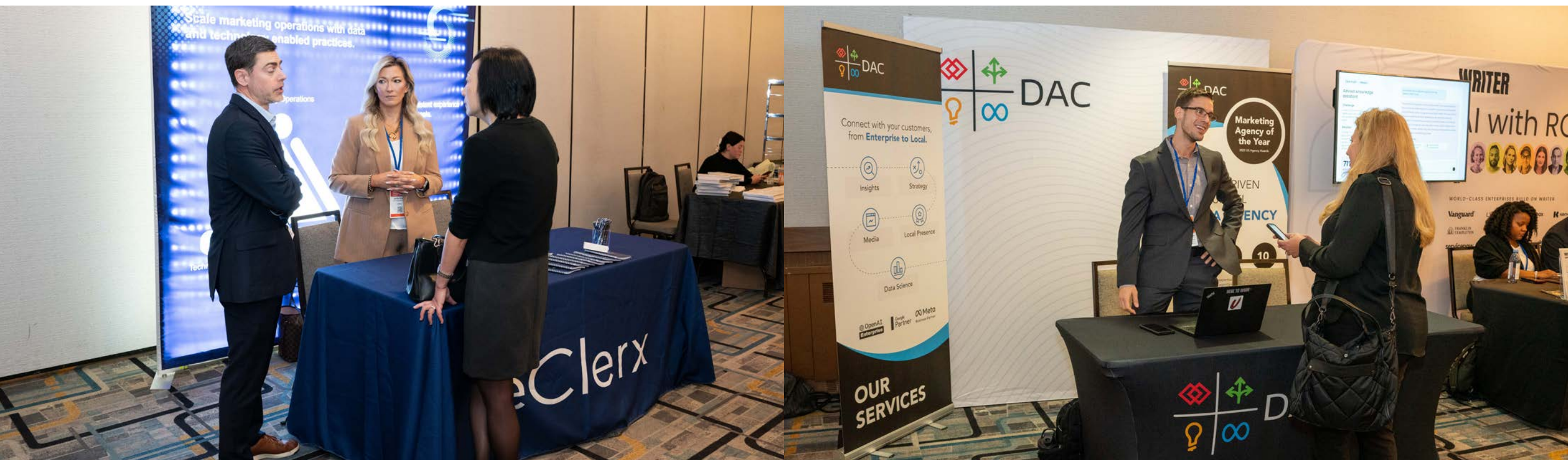
We have curated a two-day agenda packed with case studies, workshops, panel discussions, and roundtables to help you **optimize your marketing organization, technology, and strategy for maximum business impact.** We also designed two tracks to bring you the most tailored and relevant insights — one for lean marketing teams and the other for enterprise scale growth.

Join us to source best practices from market-leading brands, including **Northwestern Mutual, RBC Global Asset Management, Pacific Premier Bank, Harbour Capital, and Thrivent,** all the while making lasting business connections that will help you on your growth journey. We look forward to welcoming you into the DMFS community and hosting you this November!



Taya Prokopenko
Head of Content – Financial Services
Strategy Institute
Taya@strategyinstitute.com





SHAPING THE FUTURE OF FINANCIAL MARKETING: WHERE TECHNOLOGY AND DATA MEET CREATIVITY

The DMFS NY Summit brings together **the most innovative, forward-looking, and engaged marketing executives in finance** to explore how **technology is reshaping engagement and growth opportunities**. We will also be exploring how that technology, paired with solid strategy, can be applied to both smaller financial brands and large-scale financial enterprises. You can expect to:

- ▶ Delve into numerous case studies from a wide variety of financial brands on the topics of **growth marketing, demand generation, content strategy, personalized engagement and customer experience (CX), channel strategy, paid media, financial advisor marketing, and sales enablement**.
- ▶ Participate in engaging, intimate workshops and roundtables, where you will have a chance to **apply innovation and success frameworks to your own business**.
- ▶ Connect with peers and experts from market-leading brands like Northwestern Mutual, Northern Trust, Discover Financial, TIAA, Fannie Mae, and Wells Fargo to **brainstorm ideas and benchmark strategies**.

WHY ATTEND?

Discover countless reasons to be part of the 12th edition of this exceptional event! At DMFS New York we're dedicated to crafting a personalized experience that guarantees an outstanding two days, delivering maximum ROI with insights on leveraging the latest marketing technologies with risk management and best practices. Here's why you won't want to miss joining us in 2025.



STRATEGIC INSIGHTS

Fine tune your adaptability in uncertain markets, with sessions on how to respond to changing customer expectations, agile thinking, and agile structures



INTERACTIVE WORKSHOPS

Explore impact metrics, AI, influencer first content marketing, financial advisor marketing and more in our interactive workshop sessions



NETWORKING

Enjoy a complimentary breakfast with industry peers, plus a stunning evening reception with cocktails and prizes. Meet one-on-one with solution providers and experts.



PREPARE FOR THE FUTURE

Discover how to harness AI for campaigns that anticipate customers' needs for hyper personalization at scale with predictive analytics and to boost conversion



HAVE FUN

There's plenty to enjoy throughout the summit, including an evening reception with cocktails and prizes. A perfect chance to wind down in a fun and friendly environment.

NETWORK AND HAVE FUN

Networking and fun take centre stage at this year's event, offering the perfect balance of professional connections and social experiences. Start your day with engaging conversations at our networking breakfasts, where you can meet industry peers over coffee and fresh bites. In the evening, unwind at our cocktail reception, where great drinks, lively discussions, and new opportunities come together in a relaxed, social setting.



AGENDA AT A GLANCE

From expert-led sessions and thought-provoking keynote speakers to interactive workshops and networking opportunities, every moment at the Digital Marketing for Financial Services Midwest Summit is designed to inspire, engage, and equip you with the insights and tools needed to succeed. Prepare for a day filled with innovative ideas, meaningful connections, and valuable takeaways that will elevate your experience and leave you motivated for what lies ahead.

STRATEGIC INSIGHTS

- **Future-proof your strategy** with C-suite-tested frameworks for AI, data, and martech straight from leading financial brands
- **Accelerate measurable growth** and translate spend into immediate ROI wins for your own organization
- **Sharpen your competitive edge** with next-gen toolkits on AI agents, advanced attribution models, influencer-first content, and more

INTERACTIVE WORKSHOPS

- **LEADERSHIP TOOLKIT 2030:** Skills and Mindsets for the Next-Generation Marketing Executive
- **IMPACT METRICS MASTERCLASS:** Advanced Attribution Models for Proving Marketing Value
- **AI AGENT PLAYBOOK:** Practical Frameworks to Deploy, Govern, and Scale Intelligent Workflows
- **FINANCIAL ADVISOR MARKETING:** Driving Brand Consistency and Sales Impact Through Strategic Enablement
- **INFLUENCER-FIRST CONTENT STRATEGY:** Integrating Diverse, Human-Centric Content Formats to Set Your Brand Apart in the Financial Sector

CONTENT TRACKS

- **MANAGING CHANGE & RISK:** Rally senior stakeholders, secure budget, and embed a “marketing-as-growth-engine” mindset so your transformation projects gain traction instead of stalling in silos
- **BUILDING CAPABILITIES:** Upskill teams, retool martech stacks, and design agile processes, giving you a step-by-step playbook to elevate in-house talent and execution speed
- **DATA & AI-ENABLED GO-TO-MARKET:** Turn unified data, advanced analytics, and GenAI into actionable customer insights, precise targeting, and measurable revenue lifts you can replicate immediately

NETWORK

- Enjoy breakfast and lunch networking with industry peers and thought leaders
- Have fun at our evening reception with cocktails and prize giveaways
- Schedule one-on-one meetings with solution providers and experts

WHO ATTENDS?

We pride ourselves on having attendees from some of the **biggest brands** across the **financial services landscape**. This is your opportunity to join them and be a part of the incredible story of **DMFS New York 2025**.



TESTIMONIALS

Don't just take our word for it! Here's what some of our previous delegates have said about this incredible summit.



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

 Northwestern Mutual



Networking workshops and tracks were all great. I liked the practical applications and tips for personalization and nurturing behavior

 T.RowePrice



I enjoyed this event thoroughly. The subjects were well thought out with great speakers.

Direxion
ETFs | Funds



Topics and speakers are exactly what I needed - lots of great insights

unum®



Very relevant guest speakers, topics + vendors for CMOs today

Apple Bank



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

Mutual of America
Financial Group
Retirement Services • Investments

SPEAKER LINE UP

MANY MORE ↗

Our agenda is delivered by the best financial marketing experts across the industry. Not only will you get to hear from world-class speakers at the top of their game, but you also get to meet and network with them.



Katy Dugal Simpson
Chief Marketing Officer
The Callaway Black
Group | Northwestern
Mutual



Vickie Sherman
Chief Marketing Officer
& Senior Vice President
Pacific Premier Bank



Carolyn Sakstrup
Chief Growth Officer
Thrivent



Brian Clark
Vice President,
Marketing &
Communicationsf
Aspida



Kate Purdy
Vice President,
Marketing & Digital
Signal Financial
Federal Credit Union



Allison Yazel
Vice President,
Marketing
Manna Tree



Eric Pierni
Director, Digital
Marketing
RBC Global Asset
Management



Emily Stewart
Director, Digital
Marketing & Analytics,
Growth Strategies
Meritrust Credit Union



Sarah Weddle
Head of Brand
Marketing
Harbor Capital
Advisors

FULL AGENDA

DAY 1 - Thursday, November 6, 2025

7:30 AM REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

8:40 AM WELCOME FROM STRATEGY INSTITUTE

8:45 AM OPENING REMARKS FROM THE CHAIRPERSON

9:00 AM KEYNOTE PRESENTATION: TRANSFORMATION PLAYBOOK

Prioritizing Martech Investments for Maximum ROI in Volatile Times

Maximize every technology dollar by focusing on tools that deliver clear revenue impact, minimize operational inefficiencies, and respond swiftly to shifting market conditions. Take away specific solutions to:

- Evaluate current and prospective martech platforms using a scoring model based on business value, scalability, and cost-effectiveness.
- Reallocate budget from underperforming tools to high-yield capabilities like AI-powered analytics, automation, and real-time personalization.
- Secure C-suite buy-in and demonstrate ROI with credible, finance-aligned metrics your CFO will trust.

Optimize your stack, defend your budget, and turn martech into a resilient growth engine to amplify strategic impact across every customer touchpoint.

9:30 AM PANEL DISCUSSION: MARKETS IN MOTION

Gain proven tactics from financial marketing leaders who reallocate budgets, refine messaging, and protect revenue pipelines when economic and geopolitical conditions shift. Source practical tips to:

Enhance marketing outcomes and unleash new waves of creativity with AI tools and strategies. This panel will discuss real-world applications of AI in content creation, personalization, and campaign optimization, while addressing the regulatory requirements and key implementation considerations. Source practical tips to:

- Use agile planning frameworks to adjust channel mix and budgets in real time without sacrificing ROI.
- Leverage data signals to anticipate customer sentiment shifts and make timely updates to offers and creative.
- Apply risk-mitigation strategies that maintain brand trust while capitalizing on emerging market opportunities.

Advance your team’s ability to remain resilient, responsive, and growth-focused, regardless of market turbulence, to drive consistent performance and uncover new opportunities in any environment.

10:15 AM SPEED NETWORKING! MAKE MEANINGFUL CONNECTIONS

10:30 AM INDUSTRY EXPERT PRESENTATION: INTEGRATED MARKETING ECOSYSTEM

Harnessing Unified Data, Platforms, and GenAI for Growth

Break down silos and unlock faster, smarter marketing with an integrated, AI-ready ecosystem. Develop a blueprint to:

- Unify customer data and martech platforms into one compliant, insight-rich foundation.
- Deploy GenAI for automated content creation, dynamic segmentation, and real-time campaign optimization.
- Align teams and tools through governance strategies that accelerate speed-to-market and maximize ROI across every channel.

Transform fragmented systems into a cohesive growth engine that drives measurable revenue and deeper customer engagement.

11:00 AM REFRESHMENTS BREAK & EXHIBITOR LOUNGE VISITS

11:30 AM

TRACK 1: MANAGING CHANGE & RISK

CASE STUDY: CHANGE LEADERSHIP IN ACTION

Building Agile Marketing Organizations That Thrive on Uncertainty

Transform a traditional department into an agile, data-driven growth engine, delivering faster campaigns, higher ROI, and a culture that embraces change. Adopt best practices to:

- Restructure teams into cross-functional squads empowered to test, learn, and pivot quickly with a clear, step-by-step blueprint.
- Establish a shared language of metrics and “return on objective” to secure executive buy-in and resources, even when direct ROI is difficult to prove.
- Apply change management tactics that upskill talent, sustain momentum, and turn uncertainty into a driver of continuous innovation.

Reduce organizational risk through volatility by embedding agility, accountability, and experimentation at the core of your marketing function.

TRACK 2: BUILDING CAPABILITIES

CASE STUDY: MARTECH CONSOLIDATION

Cutting Tools While Lifting Performance

Eliminate redundant platforms, reduce costs, and boost campaign ROI by streamlining an overgrown tech stack. Master the success factors to:

- A proven audit framework to identify overlaps, under-utilized tools, and hidden licensing drain.
- Data-driven criteria for deciding which platforms to sunset, replace, or elevate, without disrupting live campaigns.
- Change management tactics to migrate users, centralize data, and reinvest savings into high-impact capabilities.

Achieve a leaner, smarter martech stack that lowers spend and elevates performance across every marketing channel.

TRACK 3: DATA & AI ENABLED GO-TO-MARKET

CASE STUDY: MARKETING TO THE NEXT GENERATION

Shifting Strategies to Engage Younger Generations

Revamp your content, channels, and messaging to win the loyalty of Gen Z and young millennials without alienating legacy audiences. Take back to your office strategies to:

- Implement platform-native tactics like short-form video, creators, and interactive tools that drive authentic engagement on TikTok, Instagram Reels, and emerging channels.
- Develop values-driven storytelling frameworks that align financial products with younger consumers’ priorities: transparency, social impact, and financial empowerment.
- Establish measurement and feedback loops that translate real-time social signals into rapid creative iterations and product enhancements.

Perfect a next-gen playbook that future-proofs your brand and captures the attention of tomorrow’s most valuable customers.

12:00 PM

TRACK 1: MANAGING CHANGE & RISK

INDUSTRY EXPERT PRESENTATION: TECHNOLOGY- ENABLED CHANGE MANAGEMENT

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

Master strategies to gain support and accelerate adoption of new marketing technologies without getting stuck in pilot purgatory. Create a roadmap to:

- Structure a compelling business case that quantifies ROI, risk reduction, and competitive advantage in terms executives understand.
- Rally cross-functional stakeholders like compliance, IT, and sales into a change coalition that champions innovation.
- Design quick-win pilots and proofs-of-concept that demonstrate value early and build unstoppable momentum.

Amplify technology-driven change to accelerate adoption, align stakeholders, and deliver measurable impact across your organization.

TRACK 2: BUILDING CAPABILITIES

INDUSTRY EXPERT PRESENTATION: MARKETING CENTER OF EXCELLENCE

Standardizing Best Practices to Elevate Talent, Tools, and Outcomes

Unlock consistent, high-impact marketing execution by building a centralized hub of expertise, processes, and governance. Walk away with an action plan on:

- Developing dynamic playbooks and templates that streamline campaign planning, content creation, and compliance approvals.
- Designing scalable training programs and mentorship initiatives to upskill teams and encourage continuous innovation.
- Implementing structured governance frameworks that align tool usage, brand standards, and performance metrics across all business units.

Bolster your Marketing CoE to increase agility, accelerate results, and ensure every campaign meets your highest standards.

TRACK 3: DATA & AI ENABLED GO-TO-MARKET

INDUSTRY EXPERT PRESENTATION: HYPER-PERSONALIZATION AT SCALE

AI-Powered Campaigns That Anticipate Needs and Boost Conversion

Elevate every customer interaction by leveraging AI to deliver hyper-personalized campaigns that drive conversions and deepen loyalty. Source practical tips to:

- Leverage predictive analytics to tailor messages and offers at the individual level.
- Automate dynamic campaign adjustments based on real-time customer signals.
- Measure lift from personalized outreach to optimize media spend and ROI.

Transform your marketing with AI-powered personalization to deepen engagement and maximize conversion rates.

FULL AGENDA

DAY 1 - Thursday, November 6, 2025

12:30 AM

TRACK 1: MANAGING CHANGE & RISK

CASE STUDY: MARKET RESILIENCE
Protecting Budgets, Reallocating Spend, and Sustaining Pipeline Growth
Maintain a healthy sales pipeline even when market conditions decline by strategically reallocating resources and defending critical channels. Achieve a step-by-step action plan to:

- Quantify the impact of market shifts on customer acquisition costs and pipeline velocity.
- Reallocate spend to high-yield campaigns and low-cost engagement tactics without sacrificing reach.
- Implement agile budget frameworks that enable rapid pivots based on real-time performance data..

Adapt your strategy to keep your pipeline strong and growth steady, regardless of market volatility.

TRACK 2: BUILDING CAPABILITIES

CASE STUDY: AGILE & LEAN OPERATIONS
Structuring Small Teams for Rapid Experimentation and Continuous Delivery
Drive faster innovation and higher throughput by organizing lean, cross-functional squads that test and iterate campaigns at speed. Develop a blueprint to:

- Design small, empowered teams with clear objectives and end-to-end ownership.
- Implement sprint-based workflows and rapid feedback loops to validate ideas quickly.
- Track key agility metrics to ensure continuous improvement. .

Optimize your marketing organization to experiment relentlessly, deliver continuously, and outperform larger, slower competitors .

TRACK 3: DATA & AI ENABLED GO-TO-MARKET

CASE STUDY: PAID MEDIA
Maximizing ROI with Algorithmic Bidding and Privacy-First Targeting
Optimize your paid campaigns for cost-efficiency and compliance by harnessing AI-driven bidding strategies and first-party data tactics. Take away specific solutions to:

- Leverage algorithmic bidding to adjust budgets and bids in real time for peak performance.
- Implement privacy-first targeting using first-party and contextual signals to reach high-intent audiences.
- Measure and attribute campaign impact accurately in a cookie-less environment. .

Improve your paid media strategy to boost ROI while maintaining customer privacy and trust .

1:00 PM

NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

2:00 PM

TRACK 1: MANAGING CHANGE & RISK

CASE STUDY: M&A MAKEOVER
Unifying Brands Without Losing Customers
Seamlessly integrate merged brands to preserve customer loyalty and amplify brand equity. Master the success factors to:

- Craft a unified brand identity that honors legacy equity and communicates a clear, consolidated value proposition.
- Execute a phased communication plan that informs and reassures customers at every touchpoint.
- Align product offerings and customer experiences to maintain continuity and build confidence throughout the transition. .

Heighten your brand integration strategy to retain trust while creating a stronger, unified presence.

TRACK 2: BUILDING CAPABILITIES

CASE STUDY: CONTENT FACTORY
Scaling Video and Social with Lean Resources
Drive consistent, high-quality content production and social engagement by establishing a streamlined “content factory” that maximizes output with minimal resources. Adopt best practices to:

- Implement efficient batch-production workflows to create multiple videos and social assets in a single shoot.
- Repurpose core assets across formats to extend reach.
- Leverage affordable tools and creative hacks to maintain quality on a lean budget.

Optimize your content engine to power social channels and video strategy without relying on a big agency or large spend.

TRACK 3: DATA & AI ENABLED GO-TO-MARKET

CASE STUDY: DEMAND SCIENCE EVOLUTION
Turning Predictive Data into Always-On Pipeline Generation
Supercharge your lead funnel by leveraging predictive analytics to identify high-potential prospects and automate continuous nurturing. Source your plan of action by:

- Applying machine learning models to score and prioritize leads based on their likelihood to convert.
- Designing automated nurture streams that trigger personalized outreach at key engagement milestones.
- Monitoring pipeline health with real-time analytics dashboards to refine targeting and maximize conversion rates.

Increase pipeline performance to ensure steady, qualified lead flow 24/7.

FULL AGENDA

DAY 1 - Thursday, November 6, 2025

2:30 AM

TRACK 1: MANAGING CHANGE & RISK

INDUSTRY EXPERT PRESENTATION: CREATIVE RISK-TAKING IN FINANCIAL MARKETING

Reinventing Brand and Media Strategies to Capture Attention

Break through the noise in the highly regulated financial arena by embracing bold, creative strategies that drive engagement and differentiation. Create a roadmap to :

- Identify calculated creative risks that break through industry noise while staying compliant.
- Design multi-channel campaigns that leverage bold storytelling to drive engagement.
- Collaborate with compliance and legal teams from day one to turn constraints into innovative opportunities.

Impact your brand with fearless creativity that wins attention and drives results in a regulated landscape .

TRACK 2: BUILDING CAPABILITIES

INDUSTRY EXPERT PRESENTATION: STRATEGIC RESPONSE MANAGEMENT

Building Always-Ready Playbooks for Real-Time Market Shifts and Crises

Ensure your team can act decisively when markets wobble or reputational threats emerge by developing proactive, battle-tested response frameworks. Take back to your office strategies to:

- Develop scenario-based playbooks that map clear actions, roles, and messaging for anticipated market or crisis events.
- Implement monitoring tools and trigger protocols to activate your response team within minutes of a market shift or reputational threat.
- Conduct regular war-gaming exercises and post-mortem reviews to refine playbooks and ensure continuous readiness.

Reduce downtime and uncertainty by equipping your marketing function to react swiftly and confidently, turning unexpected disruptions into opportunities for leadership and trust.

TRACK 3: DATA & AI ENABLED GO-TO-MARKET

INDUSTRY EXPERT PRESENTATION: SEARCH REIMAGINED

Navigating AI-Native Query Experiences and Intent Signals

Stay ahead of the AI-powered search revolution by mastering strategies that align your content with conversational queries and context-driven intent. Achieve a step-by-step action plan to:

- Optimize content for AI-driven platforms and voice assistants to ensure your brand is the top recommendation.
- Structure web and mobile experiences to capture emerging intent signals from chatbots, generative engines, and virtual assistants.
- Integrate conversational search tactics into your SEO and SEM mix to boost discoverability across text, voice, and hybrid interfaces. .

Advance your search strategy and secure visibility in the AI-first era of customer discovery to capture emerging opportunities, engage users with personalized experiences, and stay ahead of competitors.

3:00 PM

WORKSHOPS (45 mins) (Please select one)

Break into smaller groups of approximately 25 industry peers to work through practical hands-on exercises that will strengthen your role as a marketing leader within your organization.

WORKSHOP A: LEADERSHIP TOOLKIT 2030

Skills and Mindsets for the Next-Generation Marketing Executive

Future CMOs need a blend of strategic vision, technological fluency, and people leadership to excel. Take away specific solutions to:

- Assess and bridge leadership skill gaps for data-driven and AI-supported decision-making.
- Cultivate resilience, adaptability, and influence to guide teams through rapid market shifts.
- Build cross-functional partnerships to secure resources and drive impact.

Optimize your leadership toolkit to thrive as a marketing executive in 2030 and beyond.

OR

WORKSHOP B: IMPACT METRICS MASTERCLASS

Advanced Attribution Models for Proving Marketing Value

Move beyond last-click attribution to demonstrate true marketing ROI across complex customer journeys. Source practical tips to:

- Design and implement multi-touch, data-driven attribution models tailored to financial services.
- Establish lift tests and holdout experiments to measure incremental impact with statistical rigor.
- Craft executive-ready reports and dashboards that connect marketing activities to revenue and business KPIs.

Master your metrics and the storytelling needed to prove marketing's value and secure ongoing investment.

OR

WORKSHOP C: AI AGENT PLAYBOOK

Practical Frameworks to Deploy, Govern, and Scale Intelligent Workflows

- AI agents can automate campaign planning, content creation, and customer engagement when implemented correctly. Develop a blueprint to:
- Identify high-impact use cases and define success criteria for AI agent deployment.
 - Establish governance processes, human-in-the-loop checkpoints, and compliance safeguards.
 - Scale AI workflows across teams and channels while maintaining quality and brand consistency.

Amplify a ready-to-use playbook for integrating AI agents to boost efficiency and innovation in your marketing operations.

OR

WORKSHOP D: FINANCIAL ADVISOR MARKETING

Driving Brand Consistency and Sales Impact Through Strategic Enablement

- Empower your advisor network with compliant, on-brand marketing tools that accelerate sales and deepen client relationships. Master the success factors to:
- Develop turnkey, customizable campaign kits and content templates for advisor use.
 - Design training and certification programs that upskill advisors in digital and social marketing.
 - Implement feedback loops and analytics to measure advisor activity, lead generation, and revenue impact.

Transform your advisors into an aligned, empowered marketing force to drive consistent brand messaging, accelerate sales growth, and deepen client engagement.

OR

WORKSHOP E: INFLUENCER-FIRST CONTENT STRATEGY

Integrating Diverse Human-Centric Content Formats to Set Your Brand Apart in the Financial Sector

- Harness the credibility of influencers, employees, and customers to humanize your financial brand and expand reach. Adopt best practices to:
- Identify and recruit authentic voices: industry experts, client advocates, and brand ambassadors.
 - Co-create content across formats that balance compliance with genuine storytelling.
 - Amplify influencer content through paid, owned, and earned channels to maximize visibility and engagement.

Advance your influencer-first strategy to heighten trust, drive engagement, and differentiate your brand in the financial sector.

3:45 PM

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

4:15 PM

TRACK 1: MANAGING CHANGE & RISK	TRACK 2: BUILDING CAPABILITIES	TRACK 3: DATA & AI ENABLED GO-TO-MARKET
<p>INDUSTRY EXPERT PRESENTATION: COOKIE-LESS FUTURE</p> <p>Retooling Targeting in a Privacy-First Landscape</p> <p>Future-proof your marketing by adopting alternative targeting methods as third-party cookies disappear and privacy regulations tighten. Walk away with an action plan on:</p> <ul style="list-style-type: none">• Leveraging first-party data strategies to maintain precise audience targeting.• Implementing contextual and cohort-based approaches that balance relevance with compliance.• Measuring campaign performance and attribution using privacy-safe analytics and aggregated metrics. <p><i>Adapt your targeting approach for a cookie-less world to uphold user privacy while sustaining marketing performance.</i></p>	<p>INDUSTRY EXPERT PRESENTATION: AI AGENTS IN ACTION</p> <p>Streamlining Processes and Increasing Speed-to-Market with Intelligent Workflows</p> <p>Harness AI agents to automate routine tasks, accelerate campaign launches, and free your team to focus on higher-value initiatives. Create a roadmap to:</p> <ul style="list-style-type: none">• Identify the marketing functions that gain the most from AI automation.• Establish governance and human-in-the-loop checks to ensure output accuracy, compliance, and brand alignment.• Scale AI-driven workflows across your organization to enable fast, consistent execution and continuous optimization. <p><i>Bolster your operations with intelligent workflows that improve efficiency, reduce time-to-market, and enable strategic focus.</i></p>	<p>INDUSTRY EXPERT PRESENTATION: PERFORMANCE MARKETING BLUEPRINT</p> <p>Optimizing Media Mix with Real-Time Attribution and Lift Modeling</p> <p>Allocate your marketing budget more effectively by harnessing real-time performance data and incrementality testing. Take away specific solutions to:</p> <ul style="list-style-type: none">• Implement real-time attribution dashboards that track channel impact and support agile budget reallocation.• Design lift studies and holdout experiments to measure the true incremental impact of each tactic.• Continuously optimize your media mix to maximize ROI amid evolving market conditions. <p><i>Improve your performance strategy with a data-driven engine that refines spend and boosts marketing outcomes.</i></p>

FULL AGENDA

DAY 1 - Thursday, November 6, 2025

4:45 PM PANEL DISCUSSION: ENGAGEMENT REIMAGINED

Building Modern Journeys That Convert Attention into Loyalty
Capture and grow customer attention through modern, multi-channel engagement strategies. Achieve a step-by-step action plan to:

- Design cohesive experiences that seamlessly connect digital, mobile, and in-branch touchpoints.
- Leverage real-time data and AI to deliver scalable, personalized interactions.
- Track loyalty metrics and iteratively improve journey stages to boost retention and advocacy.

Increase your impact with engagement journeys that transform customer interactions into enduring loyalty and business growth.

Brian Clark, Vice President, Marketing & Communications, **Aspida**
Kate Purdy, Vice President, Marketing & Digital, **Signal Financial Federal Credit Union**

5:30 PM KEYNOTE FIRESIDE CHAT: TRANSFORMING PURPOSE-BASED BRANDS

3 Key Insights for Legacy Financial Institutions
Modernize your brand identity and amplify its purpose to create campaigns that resonate emotionally and drive measurable impact. Master the success factors to:

- Combine data-driven insights with emotional storytelling to craft breakthrough campaigns that drive engagement and conversion.
- Develop a roadmap to evolve your brand identity, honoring your heritage and core values while embracing modern relevance.
- Reframe setbacks as strategic learning moments, using failures to refine your purpose and strengthen stakeholder buy-in.

Advance your organization’s ability to honor its legacy while embracing innovation to create a purpose-driven brand that thrives in today’s dynamic market. .

Carolyn Sakstrup, Chief Growth Officer, **Thrivent**

6:00 PM END OF DAY ONE SUMMARY & CLOSING REMARKS

6:15 PM EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC, & NETWORKING



FULL AGENDA

DAY 2 - Friday, November 7, 2025

8:00 AM DAY TWO REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

8:50 AM DAY TWO OPENING REMARKS FROM THE CHAIRPERSON

9:00 AM KEYNOTE PRESENTATION: DIGITAL RISK, DIGITAL REWARD

Scaling Innovation While Managing Risk

Accelerate digital transformation and new product launches without exposing your brand to unnecessary regulatory, security, or reputational risk. Source your plan of action by:

- Embedding proactive risk assessments and compliance checks into innovation workflows to address issues early.
- Designing structured pilot programs and controlled sandboxes to encourage rapid experimentation while minimizing exposure.
- Using real-time monitoring and predictive analytics to identify emerging threats and adjust strategies effectively

Achieve the perfect balance between bold digital initiatives and robust risk management for sustainable growth.

9:30 AM INDUSTRY EXPERT PRESENTATION: SOCIAL, SEARCH, & INFLUENCE CONVERGENCE

Leveraging Cross-Channel Synergy for Exponential Reach

Drive scalable reach and deeper engagement by unifying search, social media, and influencer partnerships. Adopt best practices to:

- Craft content that ranks in AI-driven search results and fuels social sharing through influencer collaboration.
- Align paid search, organic SEO, and influencer campaigns to reinforce messaging and maximize ROI.
- Integrate cross-channel analytics to measure interaction effects and dynamically guide budget distribution.

Amplify the collective impact of social, search, and influence to expand visibility and deliver continuous growth.

10:00 AM PANEL DISCUSSION: MEDIA IN FLUX

Navigating the Rapidly Shifting Landscape of Paid, Owned, and Earned Channels

Adapt your media strategy to today’s evolving mix of traditional, digital, and social platforms for maximum impact. Source practical tips to:

- Identify high-potential emerging channels and reallocating investment to capture early-adopter audiences without exceeding budget.
- Break down silos across paid, owned, and earned teams to deliver cohesive, cross-channel campaigns.
- Update measurement frameworks to accurately track performance across today’s fragmented, privacy-focused media ecosystem..

Optimize your brand’s ability to succeed in a transforming media environment through an agile, integrated channel strategy.

10:45 AM REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

11:15 AM ROUNDTABLE DISCUSSIONS (45 MINS) (PLEASE SELECT ONE)

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.

ROUNDTABLE A: Crisis-Ready Marketing Teams. Building Rapid-Response Protocols to Address Reputational Threats.

ROUNDTABLE B: AI Governance in Marketing. Reducing Bias, Preventing Hallucinations, and Navigating Compliance Risks.

ROUNDTABLE C: Driving Digital Adoption. Overcoming Resistance to New Channels and Technologies.

ROUNDTABLE D: Generational Leadership Shifts. Managing Multi-Generational Teams and Audiences Simultaneously.

ROUNDTABLE E: Enterprise AI Readiness Securing Organization-Wide Buy-In for AI Adoption.

ROUNDTABLE F: AI Agent Adoption. Establishing Governance and Prioritizing Use-Cases for Intelligent Workflows.

ROUNDTABLE G: Analytics-Driven Decision-Making. Democratizing Advanced Measurement and Attribution Across Teams.

ROUNDTABLE H: Personalization at Scale. Building Data and Tech Capabilities for One-to-One Marketing.

ROUNDTABLE I: Search & AI Synergy. Aligning AI-Powered Intent Signals with Paid and Organic Search Strategies.

ROUNDTABLE J: Smart Media Mix. Rebalancing Budgets in Real Time for Optimal Channel Performance.

ROUNDTABLE K: Intelligent Content. Leveraging Performance Data and AI to Plan, Produce, and Distribute Content.

ROUNDTABLE L: Omnichannel Orchestration for Growth. Unifying Customer Profiles and Campaign Triggers Across Different Touchpoints.

12:00 PM

- TRACK 1: MANAGING CHANGE & RISK
- TRACK 2: BUILDING CAPABILITIES
- TRACK 3: DATA & AI ENABLED GO-TO-MARKET

INDUSTRY EXPERT PRESENTATION: AI & BRAND GOVERNANCE

Safeguarding Trust While Deploying Generative Content at Scale

Ensure every AI-driven asset upholds your brand’s integrity and compliance standards. Source practical tips to:

- Establish governance frameworks and human-in-the-loop checkpoints to vet AI-generated content for accuracy and brand voice.
- Embed compliance filters and review processes to prevent regulatory missteps in automated campaigns.
- Train AI models on brand guidelines and refine them through continuous feedback to maintain consistency. .

Excel at balancing innovation with rigorous governance and oversight to unlock the full potential of AI-powered creativity while safeguarding brand integrity and trust. .

INDUSTRY EXPERT PRESENTATION: AI-POWERED ANALYTICS

Elevating Campaign Performance and Personalization with Advanced Analytics

Unlock deeper insights and real-time optimization by integrating AI-driven analytics into your marketing stack. Master the success factors to:

- Apply predictive models to forecast customer behavior and tailor campaigns for maximum engagement.
- Implement real-time dashboards that trigger automated adjustments to messaging, channels, and budget allocation.
- Democratize data science through user-friendly AI tools and cross-functional collaboration to drive ongoing performance gains. .

Transform your analytics practice into a proactive growth engine that continually enhances personalization and ROI.

INDUSTRY EXPERT PRESENTATION: AI AGENTS FOR GROWTH

Automating Campaign Planning, Budget Allocation, and ROI Optimization

Harness the power of AI agents to manage complex marketing tasks, freeing your team to focus on strategy and creativity. Create a roadmap to:

- Identify marketing workflows that deliver the highest ROI when automated.
- Deploy AI-driven agents to plan campaigns, allocate budgets, and continuously optimize performance based on real-time data.
- Establish governance and human-in-the-loop processes to ensure AI decisions align with brand, compliance, and business objectives. .

Amplify growth and efficiency by embedding intelligent automation into your marketing operations.

12:30 PM

- TRACK 1: MANAGING CHANGE & RISK
- TRACK 2: BUILDING CAPABILITIES
- TRACK 3: DATA & AI ENABLED GO-TO-MARKET

CASE STUDY: AI-DRIVEN CHANGE MANAGEMENT

Driving Your Organization Towards Rapid and Responsible Exploration of AI Capabilities

Fast-track AI adoption without sacrificing compliance or culture by leveraging structured pilots, stakeholder education, and governance frameworks. Walk away with an action plan on:

- Designing AI pilot programs that balance innovation speed with ethical and regulatory safeguards.
- Curating stakeholder workshops and demos to build organizational AI literacy and support.
- Implementing governance and feedback loops to continuously refine AI use cases and maintain trust. .

Advance your organization’s ability to innovate responsibly and harness AI’s full potential to drive sustainable growth, build trust, and stay ahead in an evolving digital landscape.

CASE STUDY: COMPLIANT MEDIA ORCHESTRATION

Optimizing Audience Segmentation, Planning, and Spend Without Regulatory Risk

Achieve precise targeting and high ROI while adhering to strict financial regulations and privacy standards. Develop a blueprint to:

- Leverage first-party data, consented partnerships, and contextual signals for precise audience segmentation.
- Structure media plans that balance performance goals with compliance checkpoints and audit trails.
- Implement privacy-safe measurement and attribution approaches that honor regulations while driving insights.

Perfect your media campaigns to maximize marketing effectiveness while respecting regulatory requirements.

CASE STUDY: SMB CONQUEST STRATEGY

B2B Playbooks for Engaging and Winning Over Small Businesses

Capture the growing small-business segment with targeted strategies that address their unique needs and deliver measurable acquisition. Take back to your office strategies to:

- Segment SMB audiences by size, industry, and growth stage to craft tailored value propositions.
- Design multi-channel outreach that resonates with an entrepreneurial mindset.
- Measure and optimize campaigns with SMB-specific metrics like deal size, time to close, and lifetime value.

Master a proven playbook that turns small-business prospects into loyal, long-term clients.

FULL AGENDA

DAY 2 - Friday, November 7, 2025

1:00 PM

NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

2:00 PM

INDUSTRY EXPERT PRESENTATION: AI-ENHANCED ENGAGEMENT

Scaling Personalization with Intelligent Digital Experiences

Elevate digital interactions by embedding AI-driven insights and automation into every touchpoint of your online events and content experiences. Source practical tips to:

- Leverage AI to tailor event agendas, session recommendations, and networking opportunities to individual attendee profiles.
- Automate follow-up communications and content delivery based on real-time engagement signals.
- Measure and optimize digital engagement with AI-powered analytics that reveal deep insights into attendee behavior.

Transform your digital event and content strategy into a personalized, scalable engine to deepen audience engagement and accelerate business growth.

2:30 PM

TRACK 1: MANAGING CHANGE & RISK

CASE STUDY: GENERATIONAL SHIFT PLAYBOOK

Engaging Emerging Talent and Next-Gen Customers with Adaptive Messaging

Connect authentically with emerging talent and Gen Z/Millennial customers through tailored messaging and channels. Adopt best practices to:

- Create values-driven content that resonates with younger audiences' priorities.
- Select and optimize channels to reach next-gen customers and recruits on their preferred platforms.
- Implement feedback loops and analytics to refine messaging in real time based on engagement and sentiment data. .

Adapt your brand and workforce strategy to stay relevant with generation-tailored communication.

TRACK 2: BUILDING CAPABILITIES

CASE STUDY: AUTOMATION POWERHOUSE

Eliminating Repetitive Tasks to Free Teams for High-Impact Creativity

Unlock your team's creative potential by automating routine marketing workflows and freeing up time for strategy and innovation. Achieve a step-by-step action plan to:

- Identify high-value automation opportunities to eliminate manual bottlenecks.
- Select and integrate the right tools, such as RPA and marketing automation platforms, to streamline processes without disrupting operations.
- Establish governance and monitoring to ensure automated workflows maintain quality, compliance, and brand consistency.

Transform your department into an automation powerhouse that drives creativity, agility, and superior marketing outcomes.

TRACK 3: DATA & AI ENABLED GO-TO-MARKET

CASE STUDY: INTELLIGENT CONTENT ENGINE

Data-Driven Creation and Distribution for Maximum Relevance

Accelerate content ROI by using audience insights and performance data to guide every stage of creation and delivery. Master the success factors to:

- Analyze customer behavior and search trends to pinpoint high-impact topics and formats.
- Leverage AI-assisted tools to draft, optimize, and adapt content for different channels at scale.
- Automate distribution workflows — email, social, and web — to deliver the right message to the right audience at the right time. .

Enrich your content strategy with a data-informed engine that drives measurable engagement and ongoing relevance.

3:00 PM

TRACK 1: MANAGING CHANGE & RISK

PANEL DISCUSSION: RISK-REWARD CREATIVE FRAMEWORK

Balancing Bold Storytelling with Compliance in Financial Marketing

Drive bold creative campaigns that captivate audiences while embedding compliance at every stage. Take away specific solutions to:

- Establish a risk-reward rubric to evaluate creative concepts against regulatory requirements.
- Embed compliance checkpoints into the creative workflow to maintain speed and governance.
- Collaborate with legal and compliance teams early to turn constraints into creative opportunities.

Heighten your team’s creative freedom with rigorous compliance standards to drive bold campaigns that captivate and convert.

TRACK 2: BUILDING CAPABILITIES

PANEL DISCUSSION: MARKETING IMPACT MEASUREMENT

Linking Attribution, ROI, and Zero-Party Data to Clear Business Outcomes

Prove marketing’s value by combining advanced attribution models, ROI frameworks, and zero-party data insights. Source practical tips to:

- Design multi-touch attribution models that accurately reflect credit across complex customer journeys.
- Integrate zero-party data into your measurement strategy to enhance personalization and attribution accuracy.
- Present ROI-driven narratives and dashboards that link marketing activities directly to revenue, retention, and growth metrics.

Achieve measurable business outcomes from every marketing initiative to build trust and secure continued investment from executive stakeholders.

TRACK 3: DATA & AI ENABLED GO-TO-MARKET

PANEL DISCUSSION: DATA-DRIVEN DEMAND GENERATION

Optimizing Engagement, Lead Nurturing, and Pipeline Growth

Boost your funnel performance by embedding data and analytics at every stage of demand generation. Develop a blueprint to:

- Build a predictive framework to identify high-value prospects and prioritize outreach.
- Design automated, behavior-triggered nurture streams that deepen engagement and advance leads.
- Align sales and marketing through shared metrics and real-time dashboards to accelerate pipeline velocity.

Transform your demand generation engine into a data-fueled growth machine that delivers continuous, measurable results.

3:45 PM REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

4:00 PM INDUSTRY EXPERT PRESENTATION: CUSTOMER TRUST DIVIDEND

Earning Loyalty Through Transparency, Security, and Purpose-Driven Branding

Build deeper customer loyalty and unlock the long-term “trust dividend” by embedding transparency, security, and authentic purpose at the heart of your marketing. Adopt best practices to:

- Communicate pricing, fees, and product details with radical transparency to reduce friction and build credibility.
- Showcase your data security and privacy practices as a competitive advantage that reassures and retains customers.
- Align brand purpose and ESG initiatives with customer values to create emotional connections and inspire advocacy.

Amplify the trust dividend to drive loyalty, referrals, and sustainable growth in competitive markets.

4:30 PM KEYNOTE FIRESIDE CHAT: TALENT & TECH FUSION

Upskilling Teams for AI, Analytics, and the Next Wave of Martech Innovation

Prepare your organization to harness new technologies by building the skills and culture that bridge marketing, data science, and IT. Create a roadmap to:

- Identify critical skill gaps in AI, analytics, and martech, and design targeted upskilling and reskilling programs.
- Encourage cross-functional collaboration between marketing, IT, and data teams to accelerate innovation.
- Create a continuous learning culture with hands-on labs, mentorship, and strategic partnerships to keep pace with emerging tools.

Advance your workforce to lead the next era of marketing innovation through the seamless fusion of talent and technology.

5:00 PM CLOSING REMARKS & END OF SUMMIT

HOW TO REGISTER?

REGISTER NOW ↗

IN-PERSON PASS

FULL TWO-DAY ACCESS:

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables, and one week of pre-event networking via our dedicated platform

FACE-TO-FACE NETWORKING:

Connect and build valuable relationships with our audience of thought leaders

5-STAR TREATMENT:

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location

EXPO HALL:

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

SPEAKER PRESENTATIONS:

Take home 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
EXPIRES ON JULY 18, 2025

\$1,295.00

REGULAR TICKET

\$2,095.00

VIRTUAL PASS

TWO-DAY LIVE STREAM ACCESS:

Tune into keynote sessions, panel discussions and case studies with real-time Q&A from the comfort of your home

VIRTUAL NETWORKING:

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool

VIRTUAL EXPO HALL:

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

SPEAKER PRESENTATIONS:

Take home 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
EXPIRES ON JULY 18, 2025

\$895.00

REGULAR TICKET

\$1,495.00

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Contact:

Sam Caskey

Delegate Registration Manager

Email: sam.caskey@strategyinstitute.com

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