



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.

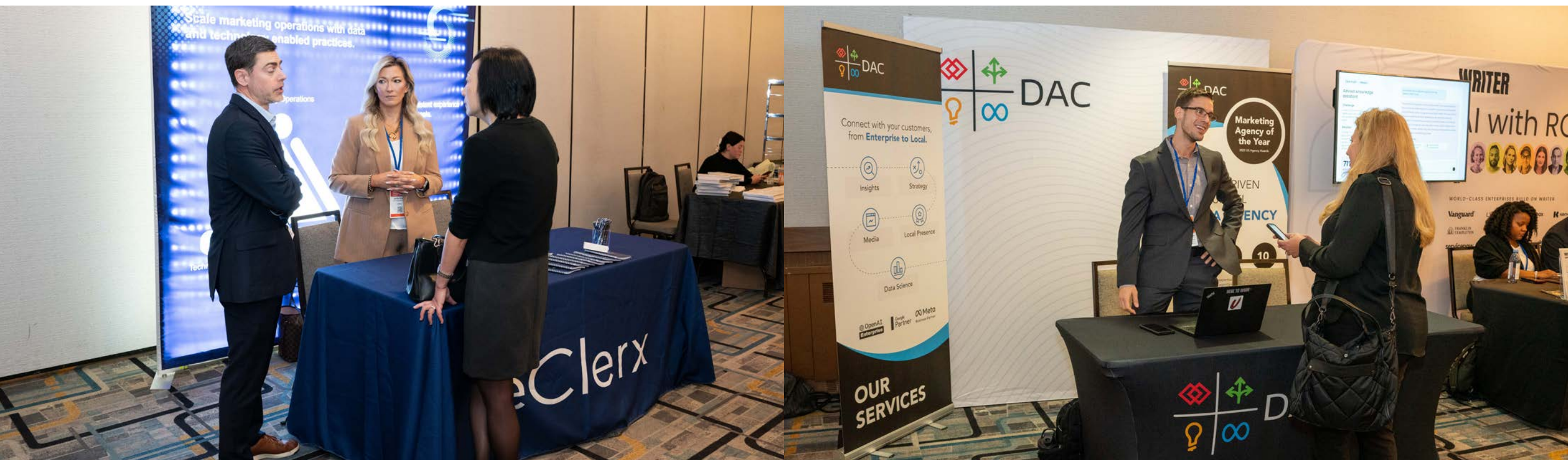
We have curated a two-day agenda packed with case studies, workshops, panel discussions, and roundtables to help you **optimize your marketing organization, technology, and strategy for maximum business impact.** We also designed two tracks to bring you the most tailored and relevant insights — one for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



Rebecca Mayoh-Davis
Senior Conference Producer
Strategy Institute
rebecca@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.



Koley Corte

Chief Marketing Officer
& Senior Vice President
MetLife



Daniel Darst

Deputy CMO
Flagstar Bank



Henry Detering

Chief Marketing Officer
Neuberger Berman



Katy Dugal Simpson

Chief Marketing Officer
**The Callaway Black
Group | Northwestern
Mutual**



Vickie Sherman

Chief Marketing Officer &
Senior Vice President
Pacific Premier Bank



Arthur Silva

Senior VP, Head of
Digital Engagement &
Martech Solutions
Fidelity Institutional



Chris Hewitt

Global Head of Brand,
Digital Marketing &
Marketing Technology,
Former Canada CMO
Sun Life



Carolyn Sakstrup

Chief Growth Officer
Thrivent



Angela Giombetti

Chief Marketing Officer
Wealthspire Advisors



Brent Korte

Chief Marketing Officer
& Senior Vice President
Ameritas

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.



Kate Brown

Chief Marketing Officer
Insurely



Matthew Lindenberg

SVP/Chief Marketing
Officer
Kearny Bank



Hunter Hoffman

Chief Marketing Officer
Starr Insurance



Brian Clark

Vice President,
Marketing &
Communications
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**



Ashley Cheretes

Director, Generative AI
Prudential Financial



Emily Stewart

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



Adiela Aviram

Assistant VP, Head
of Marketing, Affinity
Markets
Manulife +

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: FIVE GENERATIONS, ONE BRAND
<p>How to Stay Relevant Across a Century of Change</p> <p>Explore how modern bank brands can maintain a unified identity while adapting to different generational preferences, platforms, and cultural shifts. You will hear real-world examples, actionable insights, and lessons from a tenure in major legacy brands that I've helped to develop, manage, curate, and merge including:</p> <ul style="list-style-type: none">• The Generational Landscape: A hands-on approach to understanding the five living generations, their defining traits, and how these differences shape brand perception.• The Continuity–Change Paradox: How to signal stability and consistency in the brand while evolving and flexing messages and channels for different audiences.• Your Story-telling Teammates: Frameworks for tailoring storytelling without diluting the core brand promise – and engaging your front-line bankers to be master storytellers.• Data-Driven Personalization: Using analytics and AI responsibly to deliver relevance while respecting privacy and values. <p><i>Balance consistency with agility, ensuring your brand remains relevant, trusted, and future ready.</i></p> <p>Daniel Darst, Deputy CMO, Flagstar Bank</p>	

9:30 AM	KEYNOTE PANEL DISCUSSION: CMO INSIGHTS
<p>Leading Systemic Change, Scaling Trust and Driving Enterprise Growth</p> <p>Hear C-suite marketing leaders reveal how they position marketing as a catalyst for enterprise-wide growth while navigating economic uncertainty, accelerating brand purpose, and building organizational resilience. You will walk away with actionable strategies on:</p> <ul style="list-style-type: none">• Championing systemic change—aligning culture, data, and cross-functional collaboration to embed marketing at the heart of business strategy.• Scaling trust and relevance—combining purpose-driven storytelling with robust governance to deepen stakeholder confidence across volatile markets.• Strengthening risk resilience—turning uncertainty into opportunity through scenario planning, agile decision frameworks, and proactive reputation management. . <p><i>Gain the leadership insights needed to elevate marketing as a growth engine and guide your organization confidently through change.</i></p> <p>Henry Detering, Chief Marketing Officer, Neuberger Berman Thanh Hong, Strategic Account Executive, Kaltura</p>	
10:15 AM	SPEED NETWORKING! MAKE MEANINGFUL CONNECTIONS
10:30 AM	INDUSTRY EXPERT PRESENTATION: INTEGRATED MARKETING ECOSYSTEM
<p>Harnessing Unified Data, Platforms, and GenAI for Growth</p> <p>Break down silos and unlock faster, smarter marketing with an integrated, AI-ready ecosystem. Develop a blueprint to:</p> <ul style="list-style-type: none">• 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. <p><i>Transform fragmented systems into a cohesive growth engine that drives measurable revenue and deeper customer engagement.</i></p> <p>Nasser Sahlool, Senior Vice President, Strategy, DAC</p>	
11:00 AM	REFRESHMENTS BREAK & EXHIBITOR LOUNGE VISITS

11:30 AM

TRACK 1: RESILIENT BRAND

CASE STUDY: THE MODERN MARKETING PLAYBOOK

Bridging Data, Creativity, and Business Strategy to Drive Growth

Generate measurable business impact, align with financial decision-makers, and scale their efforts for maximum ROI by leveraging data, marketing technology, and creative strategy. This keynote will explore the core marketing skills and strategic levers needed to create high-value, insight-driven marketing functions. You will walk away with:

- A roadmap for connecting marketing strategy with business objectives to secure investment and leadership buy-in.
- Strategies to integrate data, creativity, and marketing technology for personalized engagement at scale.
- Insights on building a marketing career by aligning with key stakeholders, from the CMO to the CFO and CIO.

Reimagine marketing as a strategic, revenue-driving force that shapes the future of your business.

Chris Hewitt, Global Head of Brand, Digital Marketing & Marketing Technology, Former Canada CMO, **Sun Life**

TRACK 2: MODERN MARKETING CAPABILITIES

CASE STUDY: AI-POWERED WORKFLOW REINVENTION AT PRUDENTIAL

Reimagining Your Marketing Workflow to Eliminate Pain Points and Improve Speed to Market

Redefine your marketing strategy and transform your marketing operations at scale using Generative AI. You will walk away with practical advice on:

- Deploying AI agents that draft creative briefs, link internal + external data, and auto-route projects through Workfront to slash cycle times.
- Activating Adobe Target's generative-AI features to fuel true one-to-one personalization while filtering low-quality outputs via human-in-the-loop safeguards.
- Leading change management - mapping workflow pain points, piloting quick wins, and guiding stakeholders through tough "keep vs. change" decisions.

Transform your marketing operations into an AI-enhanced engine that speeds personalization to market and frees talent for high-value creativity.

Ashley Cheretes, Director, Generative AI CMO, **Prudential Financial**

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.

Arthur Silva, Senior Vice President, Head of Digital Engagement & Martech Solutions, **Fidelity Institutional**

12:00 PM

TRACK 1: RESILIENT BRAND

INDUSTRY EXPERT PRESENTATION: PERSONALIZATION THAT PAYS OFF

Delivering Compliant, Scalable Customer Journeys in Financial Service

Barriers like legacy technology, regulatory constraints, and siloed data and content often prevent financial institutions from executing their personalization strategy to the extent they desire. It doesn't have to be that way. Take away specific solutions to:

- Configure your marketing technology stack in a way that facilitates easier and more impactful personalization for your team
- Incorporate AI into your personalization strategy without sacrificing on quality or compliance
- Get all of your disparate sources data and content pulling together in the same direction to reach your personalization goals

Elevate your digital marketing strategy with a secure, scalable approach to personalization that drives measurable growth in financial services.

Mark Melton, US Market Development & Partnerships Leader, **Magnolia**

TRACK 2: MODERN MARKETING 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.

Matt Roche, CEO, **Extole**

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.

12:30 PM		
TRACK 1: RESILIENT BRAND	TRACK 2: MODERN MARKETING CAPABILITIES	TRACK 3: DATA & AI ENABLED GO-TO-MARKET
<p>CASE STUDY: FUTURE-PROOF BRAND DIFFERENTIATION</p> <p>Building a Stand-Out Financial Brand with Technology, Bold Identity, and Customer-Centric Innovation</p> <p>Cut through product parity and industry inertia by fusing bold branding, cross-industry inspiration, and tech-driven simplicity into a scalable growth engine. You will walk away with practical advice on:</p> <ul style="list-style-type: none">Leveraging technology to transform complex, slow products into experiences defined by speed, service, and simplicity.Crafting an unmistakable brand—visual identity, mascots, and programs—that resonates now and with tomorrow’s customers.Balancing AI automation with human empathy to deliver personalized engagement while sustaining a customer-centric culture. <p><i>Leave equipped to differentiate your brand today and future-proof its relevance for the next decade.</i></p> <p>Brian Clark, Vice President, Marketing & Communications, Aspida</p>	<p>CASE STUDY: MODERN FINANCIAL MARKETING FOR ADVISORS</p> <p>Empowering Advisors to Build Stronger Client Connections in a Digital Era</p> <p>Develop a successful advisor marketing program that leverages social media, personalization, and targeted outreach. Discover how innovative strategies have empowered advisors to enhance their presence, connect with diverse client segments, and build stronger relationships. Source effective tips on:</p> <ul style="list-style-type: none">Creating a strategic social media framework that helps advisors position themselves effectively in the digital space.Balancing compliance requirements with authentic, personalized marketing to engage both older clientele and the next generation.Developing strategies that enable advisors to build trust, improve visibility, and showcase their expertise. <p><i>Transform advisor marketing strategies to align with evolving client expectations and market dynamics.</i></p> <p>Katy Dugal Simpson, Chief Marketing Officer, The Callaway Black Group, Northwestern Mutual</p>	<p>CASE STUDY: DATA-DRIVEN CONTENT STRATEGY</p> <p>Blending Data, Brand, and Behavioural Insights to Drive Engagement and Loyalty</p> <p>Discover how to craft a powerful, data-driven narrative that seamlessly integrates content and brand strategy, rooted in behavioural science. This case study will share practical insights. Adopt best practices to:</p> <ul style="list-style-type: none">Develop audience-centric marketing strategies that combine data insights with behavioural patterns.Build nuanced audience personas to shape narratives that connect emotionally and intellectually.Align content with your brand’s identity and audience behaviours to optimize engagement across channels. <p><i>Amplify behavioural science and data to create content that attracts and deeply resonates, driving meaningful connections and lasting loyalty.</i></p> <p>Kate Brown, Chief Marketing Officer, Insurely</p>

1:00 PM		
NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS		
2:00 PM		
TRACK 1 CONTINUED: RESILIENT BRAND	TRACK 2 CONTINUED: MODERN CAPABILITIES	TRACK 3: DATA & AI ENABLED GO-TO-MARKET
<p>PRESENTATION: WORK AROUND THE WORK</p> <p>Elevating Marketing’s Credibility and Influence in the C-Suite</p> <p>CMOs often struggle to showcase marketing’s value, align brand and sales enablement, and secure a participatory seat at strategic tables. This session reveals a pragmatic framework to overcome those headwinds and amplify marketing’s voice enterprise-wide. You will walk away with actionable strategies on:</p> <ul style="list-style-type: none">Building credibility with business heads and C-suite leaders through data-backed wins and aligned KPIs.Applying outward-facing marketing and communications skills internally to shape perception and drive collaboration.Securing invitations to critical strategy discussions by demonstrating proactive insight and cross-functional impact. <p><i>Position yourself and your team as indispensable growth partners who shape, rather than follow, enterprise strategy.</i></p> <p>Vickie Sherman, Chief Marketing Officer & Senior Vice President, Pacific Premier Bank</p>	<p>CASE STUDY: FUTURE-PROOF GROWTH-DRIVEN MARKETING</p> <p>Streamlining Content Supply Chains and Roles for an AI-Driven Landscape</p> <p>Replace manual bottlenecks with AI-powered workflows and re-skill your staff for high-value, data-driven work. You will walk away with practical advice on:</p> <ul style="list-style-type: none">Automating the content supply chain, from creative brief to asset deployment, so brand managers and analysts can focus on strategy, not production.Defining and hiring for new AI-augmented roles while setting clear KPIs for efficiency and revenue impact.Rolling out a phased change plan that captures early “soft” wins (speed, cost) and hard metrics (NPS lift, revenue per asset) to fuel ongoing investment. <p><i>Equip your organization to thrive in an AI-driven future by blending automation, new capabilities, and measurable business outcomes.</i></p>	<p>CASE STUDY: DEMAND SCIENCE EVOLUTION</p> <p>Turning Predictive Data into Always-On Pipeline Generation</p> <p>Supercharge your lead funnel by leveraging predictive analytics to identify high-potential prospects and automate continuous nurturing. Source your plan of action by:</p> <ul style="list-style-type: none">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. <p><i>Increase pipeline performance to ensure steady, qualified lead flow 24/7.</i></p>

2:30 PM

TRACK 1 CONTINUED:
RESILIENT BRAND

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 CONTINUED:
MODERN 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

MARKETING LEADERSHIP AND CAREER PROGRESSION
Building the Skills and Visibility Needed for Executive Roles

Marketing professionals often find themselves at a crossroads once they've mastered core technical skills, realizing leadership requires a different set of competencies. This workshop will explore how to chart a clear growth path, develop the leadership skills essential for senior roles, and cultivate sponsorship that accelerates career progression. You will walk away with actionable strategies on:

- Identifying leadership gaps and proactively addressing them to transition from tactical to strategic influence.
- Seeking and securing sponsorship from senior leaders to open new opportunities and broaden your visibility.
- Building the purpose-led identity, confidence, and communication skills needed to thrive at the executive level.

Empower yourself to break through career plateaus, elevate your leadership impact, and shape your journey in modern marketing.

Led by **Adiela Aviram**, Assistant VP, Head of Marketing, Affinity Markets, Manulife

OR

WORKSHOP B: AI-DRIVEN TEAM BLUEPRINT

Mapping Automation, Augmentation, and New Roles for Maximum Impact

Design a future-ready marketing organization by separating tasks into three clear buckets around automation, augmentation and elevation, assigning the right KPIs, talent, and tools to each. You will walk away with actionable strategies on:

- Applying the "Three-Phase Framework" to pinpoint what can be fully automated, which activities AI should augment, and where human ingenuity remains irreplaceable.
- Defining workforce shifts: redeploying staff toward high-value, revenue-generating functions and tracking revenue, NPS, and asset-level performance to prove impact.
- Identifying and developing new roles, whilst resetting leadership expectations around coaching and continuous upskilling.

Leave equipped to streamline operations, amplify human potential, and future-proof your marketing team in an AI-driven landscape.

OR

FULL AGENDA

DAY 1 - Thursday, November 6, 2025

WORKSHOP C: AI ADOPTION ACCELERATOR

Achieving 80 % Tool Uptake by Putting the Right Tech in the Right Place at the Right Time

Drive enterprise-wide adoption of new marketing platforms by aligning tools with workflows, champions, and measurable value. You will walk away with actionable strategies on:

- Mapping pain points and matching features to real user jobs-to-be-done to spark immediate “aha” moments.
- Building an enablement engine—training paths, use-case libraries, and peer champions—that sustains momentum beyond launch.
- Tracking adoption metrics and showcasing quick-win ROI to secure ongoing executive support and budget.

Leave equipped to crack the adoption code and embed new technology seamlessly across your marketing organization.

Led by **Ashley Cheretes**, Director, Generative AI, **Prudential Financial**

OR

WORKSHOP D: FINANCIAL ADVISOR MARKETING

How Are You Framed? Helping Advisors Define, Design & Deliver Their Brand

While national initiatives provide great tools and infrastructure, the real impact happens locally, where advisors show up in their communities, build relationships, and frame their unique value. This workshop shifts the focus from corporate-scale enablement to individual advisor brand alignment. We'll walk through a framework that empowers advisors to clarify how they're currently framed in the marketplace and how to reshape that to better reflect their values, business goals, and ideal client relationships. From there, we'll explore how to:

- Define your personal brand and advisory message using a proven framing framework.
- Design digital and social content that aligns with your identity and resonates with your audience—including plug-and-play content templates.
- Deliver your message with consistency, using simple feedback loops and brand-friendly analytics to track engagement, relationship depth, and defining real ROI, not just impressions.

By the end of this session, advisors will walk away with a customizable toolkit and a clearer picture of how to show up online and in person in a way that deepens client relationships and accelerates growth.

Led by **Katy Dugal Simpson**, Chief Marketing Officer, **The Callaway Black Group, Northwestern Mutual**

OR

WORKSHOP E: INFLUENCER-FIRST CONTENT STRATEGY

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

Explore how innovative financial brands are breaking away from traditional marketing by integrating diverse, human-centric content formats. This workshop will showcase the strategic implementation of influencer-first approaches, creative storytelling through influencers, SMEs, and brand ambassadors, as well as leveraging platforms like podcasts, YouTube, and blogs. Take back to your office strategies to:

- Build authentic connections with audiences through relatable and engaging content.
- Create a cohesive content ecosystem that amplifies your brand's reach and impact.
- Align your content strategy with organizational goals to deliver measurable results.

Transform your approach to content creation to position your brand as a leader in the financial sector.

Led by **Angelica Montagano**, Head of Brand Experience, **PWL Capital**

3:45 PM

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

4:15 PM

TRACK 1 CONTINUED:
RESILIENT BRAND

INDUSTRY EXPERT PRESENTATION:

The future of financial messaging: Driving growth with an autonomous lifecycle

The future of financial messaging is autonomous—intelligent, efficient, and adaptive across the entire customer journey. Static campaigns and manual workflows can't keep pace with rising expectations or regulatory complexity. This session led by Justin Orgel, Senior Director of Business Architect at Marigold, explores how top financial brands are embracing autonomous lifecycle messaging, powered by AI, to streamline workflows, personalize content, and ensure compliance—while delivering smarter, more impactful customer experiences at every stage.

- From Campaigns to Conversations: Shift from static sends to messaging systems that evolve with each customer's journey.
- Smarter Message Timing & Cadence: Use AI to optimize when, how often, and what to send, based on real behavior and context.
- Dynamic, Real-Time Content: Boost engagement with LivePolls, LiveTracking, LiveSocial, and personalized offers.
- Streamlined Compliance: Build workflows with tone, disclosure, audit, and accessibility checks embedded from the start.
- Scalable Messaging Architecture: See how top FinServ brands are modernizing their messaging and tech stacks for agility and growth.

Adapt your targeting approach for a cookie-less world to uphold user privacy while sustaining marketing performance.

Justin Orgel, Senior Director, Architect, **Marigold USA**

TRACK 2 CONTINUED:
MODERN CAPABILITIES

INDUSTRY EXPERT PRESENTATION: AI AGENTS IN ACTION

Streamlining Processes and Increasing Speed-to-Market with Intelligent Workflows

Harness AI agents to automate routine tasks, accelerate campaign launches, and free your team to focus on higher-value initiatives. Create a roadmap to:

- 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.

Bolster your operations with intelligent workflows that improve efficiency, reduce time-to-market, and enable strategic focus.

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

INDUSTRY EXPERT PRESENTATION: PERFORMANCE MARKETING BLUEPRINT

Optimizing Media Mix with Real-Time Attribution and Lift Modeling

Allocate your marketing budget more effectively by harnessing real-time performance data and incrementality testing. Take away specific solutions to:

- 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.

Improve your performance strategy with a data-driven engine that refines spend and boosts marketing outcomes.

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**

Jonathan Milne, VP, AI, **Demand Spring**

5:15 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**

5:45 PM

END OF DAY ONE SUMMARY & CLOSING REMARKS

5:50 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 FIRESIDE CHAT: MARKETS IN MOTION
	<p>Safeguarding Performance and Driving Growth Amid Uncertainty</p> <p>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:</p> <ul style="list-style-type: none">• 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. <p><i>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.</i></p> <p>Koley Corte, Chief Marketing Officer & Senior Vice President, MetLife</p>
9:30 AM	INDUSTRY EXPERT PRESENTATION: SOCIAL, SEARCH, & INFLUENCE CONVERGENCE
	<p>Leveraging Cross-Channel Synergy for Exponential Reach</p> <p>Drive scalable reach and deeper engagement by unifying search, social media, and influencer partnerships. Adopt best practices to:</p> <ul style="list-style-type: none">• 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. <p><i>Amplify the collective impact of social, search, and influence to expand visibility and deliver continuous growth.</i></p>
10:00 AM	PANEL DISCUSSION: MEDIA IN FLUX
	<p>Navigating the Rapidly Shifting Landscape of Paid, Owned, and Earned Channels</p> <p>Adapt your media strategy to today's evolving mix of traditional, digital, and social platforms for maximum impact. Source practical tips to:</p> <ul style="list-style-type: none">• 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.

	<ul style="list-style-type: none">• Update measurement frameworks to accurately track performance across today's fragmented, privacy-focused media ecosystem.. <p><i>Optimize your brand's ability to succeed in a transforming media environment through an agile, integrated channel strategy.</i></p> <p>Angela Giombetti, Chief Marketing Officer, Wealthspire Advisors</p> <p>Matthew Lindenberg, SVP/Chief Marketing Officer, Kearny Bank</p>
10:45 AM	REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS
11:15 AM	ROUNDTABLE DISCUSSIONS (45 MINS) (PLEASE SELECT ONE)
	<p>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.</p> <p>ROUNDTABLE A: CRISIS-READY MARKETING TEAMS. Building Rapid-Response Protocols to Address Reputational Threats.</p> <p>ROUNDTABLE B: AI GOVERNANCE IN MARKETING. Reducing Bias, Preventing Hallucinations, and Navigating Compliance Risks.</p> <p>ROUNDTABLE C: CREDIT UNION MERGER SUCCESS. Turning Member Consent into Long-Term Loyalty and Growth.</p> <p><i>Led by Emily Stewart, Director, Digital Marketing & Analytics, Growth Strategies, Meritrust Credit Union</i></p> <p>ROUNDTABLE D: GENERATIONAL LEADERSHIP SHIFTS. Managing Multi-Generational Teams and Audiences Simultaneously.</p> <p>ROUNDTABLE E: ENTERPRISE AI READINESS. Securing Organization-Wide Buy-In for AI Adoption.</p> <p>ROUNDTABLE F: AI AGENT ADOPTION. Establishing Governance and Prioritizing Use-Cases for Intelligent Workflows.</p> <p>ROUNDTABLE G: ANALYTICS-DRIVEN DECISION-MAKING. Democratizing Advanced Measurement and Attribution Across Teams.</p> <p>ROUNDTABLE H: DATA-DRIVEN STORYTELLING. Building a Beloved Brand in a Hated Industry..</p> <p><i>Led by Kate Brown, Chief Marketing Officer, Insurely</i></p> <p>ROUNDTABLE I: SEARCH & AI SYNERGY. Aligning AI-Powered Intent Signals with Paid and Organic Search Strategies.</p> <p><i>Led by Andrew Riker, Associate Director, Digital Marketing, RBC Global Asset Management</i></p> <p>ROUNDTABLE J: ADVISOR AI TOOLKIT. Practical Dos and Don'ts for Building a Personal Brand.</p> <p><i>Led by Angela Giombetti, Chief Marketing Officer, Wealthspire Advisors</i></p> <p>ROUNDTABLE K: INTELLIGENT CONTENT. Leveraging Performance Data and AI to Plan, Produce, and Distribute Content.</p> <p>ROUNDTABLE L: OMNICHANNEL ORCHESTRATION FOR GROWTH. Unifying Customer Profiles and Campaign Triggers Across Different Touchpoints.</p>

12:00 PM

TRACK 1: MANAGING CHANGE & RISK

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.

TRACK 2: BUILDING CAPABILITIES

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.

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

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

CASE STUDY: THE POWER OF THE UNSCALABLE

Balancing High-Touch Impact with Scalable Efficiency

Break free from “automate everything” thinking and discover how bespoke, relationship-driven tactics can drive unmatched trust, loyalty, and differentiation in financial services. You will walk away with actionable strategies on:

- Identifying moments in the customer journey where hyper-personalized outreach delivers outsized ROI compared to automated campaigns.
- Designing unscalable experiences—concierge onboarding, custom content, surprise-and-delight touchpoints—that deepen emotional connections.
- Integrating high-touch initiatives with automated programs to create a balanced marketing mix that maximizes both efficiency and human impact.

Leave with a refreshed perspective on when to scale, when not to, and how unscalable moments can make your brand unforgettable.

Sarah Weddle, Head of Brand Marketing, **Harbor Capital Advisors**

TRACK 2: BUILDING CAPABILITIES

CASE STUDY: INTENT-DRIVEN FORECASTING

Harnessing Search Data, AI Models and Integrated Infrastructure to Predict Business Growth

Leverage enterprise-grade data integration and AI to convert digital signals into accurate forecasts of product demand and asset inflows. You will walk away with practical advice on:

- Building a unified data infrastructure that blends on-site behavior, CRM records, and external search intent for AI modeling.
- Training forecasting models that translate search-volume shifts into early indicators of mutual-fund interest and broader market demand.
- Connecting marketing activity to revenue uplift with attribution frameworks that link intent clusters to actual inflows and business KPIs.

Transform digital marketing from click generation to growth prediction by operationalizing AI-powered intent insights across your organization.

Eric Pierni, Director, Digital Marketing, **RBC Global Asset Management**

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

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.

Mark Bornstein, Vice President, Marketing & Chief Evangelist, **ON24**

2:30 PM

TRACK 1 CONTINUED:
RESILIENT BRAND

**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 CONTINUED:
MODERN CAPABILITIES

**CASE STUDY: IN-HOUSE
CRM ENGINE**

**Turning Member
Engagement Metrics into a
Profitability Growth Driver**

Build a custom CRM that captures the right data, earns executive credibility, and propels credit-union growth. You will walk away with practical advice on:

- Designing a home-grown CRM architecture that unifies member data, scales easily, and avoids the common pitfalls that doom off-the-shelf implementations.
- Creating an engagement index that translates marketing interactions into a metric executives understand - loyalty, wallet share, and lifetime value.
- Linking engagement scores to profitability goals and using CRM insights to prioritize campaigns, cross-sell opportunities, and resource allocation.

Transform your CRM from a contact database into a strategic growth engine that drives measurable revenue and member loyalty.

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

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 CONTINUED: RESILIENT BRAND	TRACK 2 CONTINUED: MODERN CAPABILITIES	TRACK 3: DATA & AI ENABLED GO-TO-MARKET
<p>PANEL DISCUSSION: RISK-REWARD CREATIVE FRAMEWORK</p> <p>Balancing Bold Storytelling with Compliance in Financial Marketing</p> <p>Drive bold creative campaigns that captivate audiences while embedding compliance at every stage. Take away specific solutions to:</p> <ul style="list-style-type: none">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. <p><i>Heighten your team’s creative freedom with rigorous compliance standards to drive bold campaigns that captivate and convert.</i></p> <p>Angelica Montagano, Head of Brand Experience, PWL Capital</p> <p>Hunter Hoffman, Chief Marketing Officer, Starr Insurance</p>	<p>PANEL DISCUSSION: MARKETING IMPACT MEASUREMENT</p> <p>Linking Attribution, ROI, and Zero-Party Data to Clear Business Outcomes</p> <p>Prove marketing’s value by combining advanced attribution models, ROI frameworks, and zero-party data insights. Source practical tips to:</p> <ul style="list-style-type: none">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. <p><i>Achieve measurable business outcomes from every marketing initiative to build trust and secure continued investment from executive stakeholders.</i></p> <p>Rashim Parmar, Rashim Parmar, Senior Manager, Software engineering, Advertising Technology, Discover</p>	<p>PANEL DISCUSSION: DATA-DRIVEN DEMAND GENERATION</p> <p>Optimizing Engagement, Lead Nurturing, and Pipeline Growth</p> <p>Boost your funnel performance by embedding data and analytics at every stage of demand generation. Develop a blueprint to:</p> <ul style="list-style-type: none">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. <p><i>Transform your demand generation engine into a data-fueled growth machine that delivers continuous, measurable results.</i></p> <p>Andrew Riker, Associate Director, Digital Marketing, RBC Global Asset Management</p> <p>Sarah Madden, Growth Marketing & Communications Lead, BOXX Insurance</p>

3:45 PM	REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS
4:00 PM	INDUSTRY EXPERT PRESENTATION: CUSTOMER TRUST DIVIDEND
	<p>Earning Loyalty Through Transparency, Security, and Purpose-Driven Branding</p> <p>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:</p> <ul style="list-style-type: none">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. <p><i>Amplify the trust dividend to drive loyalty, referrals, and sustainable growth in competitive markets.</i></p>
4:30 PM	KEYNOTE FIRESIDE CHAT: TALENT & TECH FUSION
	<p>Upskilling Teams for AI, Analytics, and the Next Wave of Martech Innovation</p> <p>Prepare your organization to harness new technologies by building the skills and culture that bridge marketing, data science, and IT. Create a roadmap to:</p> <ul style="list-style-type: none">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. <p><i>Advance your workforce to lead the next era of marketing innovation through the seamless fusion of talent and technology.</i></p>
5:00 PM	CLOSING REMARKS & END OF SUMMIT

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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

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EARLY BIRD
EXPIRES ON SEPT 26, 2025

\$1,195.00

REGULAR TICKET

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