



DRIVING CUSTOMER GROWTH THROUGH IMPACTFUL DIGITAL MARKETING & EXPERIENCE STRATEGIES

[REGISTER NOW](#) ↗

12th Annual

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

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

WWW.FINANCIALDIGITALMARKETINGUS.COM

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



CONTENTS

01. MESSAGE FROM THE PRODUCER

02. INTRO: SHAPING THE FUTURE OF FINANCIAL MARKETING

03. WHY ATTEND?

04. NETWORK AND HAVE FUN

05. AGENDA AT A GLANCE

06. WHO ATTENDS?

07. TESTIMONIALS

08. SPEAKER LINEUP

09. FULL AGENDA

10. HOW TO REGISTER

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.

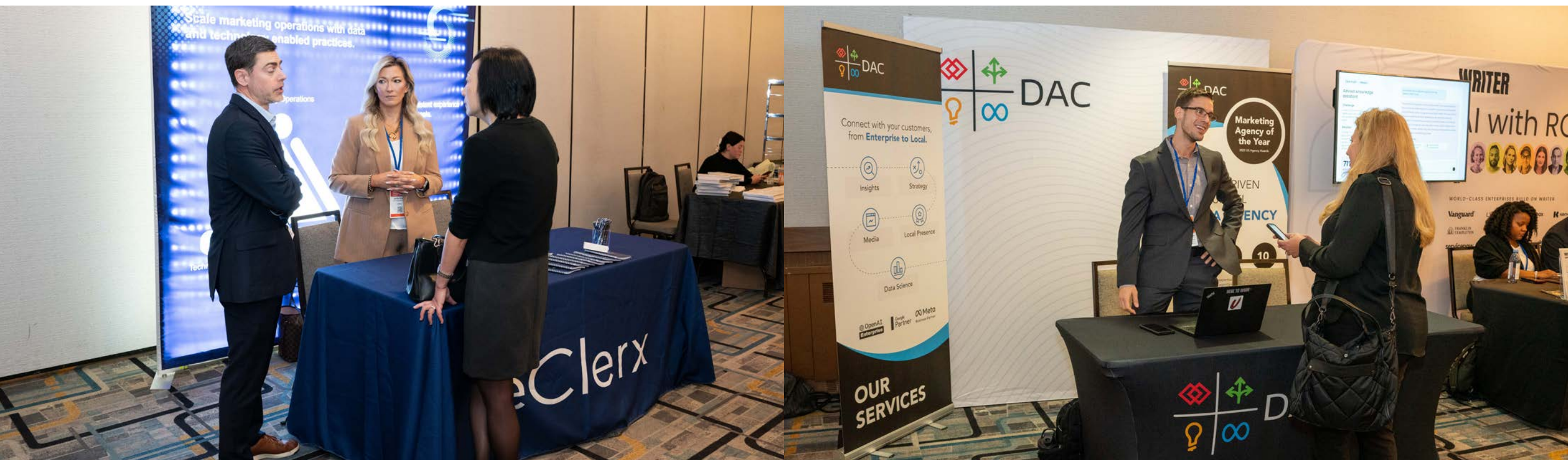
We have curated a two-day agenda packed with case studies, workshops, panel discussions, and roundtables to help you **optimize your marketing organization, technology, and strategy for maximum business impact.** We also designed two tracks to bring you the most tailored and relevant insights — one for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

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.



Daniel Darst

Deputy CMO
Flagstar Bank



Jacob Holtgrew

Global Head of Digital
Marketing and Media
TIAA



Henry Detering

Chief Marketing Officer
Neuberger Berman



Katy Dugal Simpson

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



Walter Agumbi

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



Vickie Sherman

Chief Marketing Officer &
Senior Vice President
Pacific Premier Bank



Arthur Silva

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



Vitthal K. Parker

Vice President,
Marketing Strategy
Lead
JP Morgan & Chase



Carolyn Sakstrup

Chief Growth Officer
Thrivent



Med Yacoub

Marketing Director
Tradesk

SPEAKER LINEUP

MANY MORE ↗

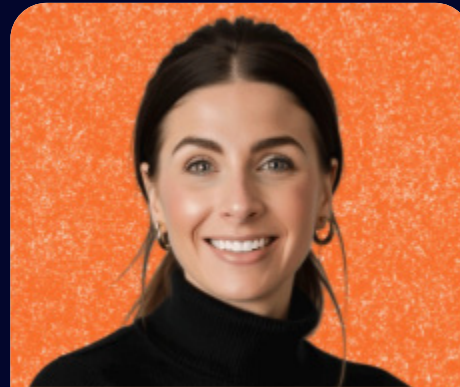
Our agenda is delivered by the best financial marketing experts across the industry. Not only will you get to hear from world-class speakers at the top of their game, but you also get to meet and network with them.



Angela Giombetti
Chief Marketing Officer
Wealthspire Advisors



Brent Korte
Chief Marketing Officer
& Senior Vice President
Ameritas



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



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

FULL AGENDA

DAY 1 - Thursday, November 6, 2025

7:30 AM	REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS
8:40 AM	WELCOME FROM STRATEGY INSTITUTE Rebecca Mayoh-Davis, Production Manager, Strategy Institute
8:45 AM	OPENING REMARKS FROM THE CHAIRPERSON Stephen Diorio, Executive Vice President Growth Strategy, GreenThread
9:00 AM	KEYNOTE PRESENTATION: FIVE GENERATIONS, ONE BRAND How to Stay Relevant Across a Century of Change 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: <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. <i>Balance consistency with agility, ensuring your brand remains relevant, trusted, and future ready.</i> Daniel Darst, Deputy CMO, Flagstar Bank

9:30 AM	KEYNOTE PANEL DISCUSSION: CMO INSIGHTS Leading Systemic Change, Scaling Trust and Driving Enterprise Growth 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: <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. . <i>Gain the leadership insights needed to elevate marketing as a growth engine and guide your organization confidently through change.</i> Henry Detering, Chief Marketing Officer, Neuberger Berman Thanh Hong, Strategic Account Executive, Kaltura Med Yacoub, Marketing Director, Tradesk Stephen Diorio, Executive Vice President Growth Strategy, GreenThread <small>MODERATOR</small>
10:15 AM	SPEED NETWORKING! MAKE MEANINGFUL CONNECTIONS
10:30 AM	INDUSTRY EXPERT PRESENTATION: Futureproof: Building the Culture That Makes Innovation Inevitable Why AI Alone Won't Save You BIn a world where technology evolves faster than organizations, innovation isn't just about new ideas — it's about creating the conditions that allow ideas to thrive. This keynote explores why most innovation efforts fail, the cultural principles that make them succeed, and how those same principles are essential to unlocking the revolutionary potential of AI. Drawing from experience at Amex, Deloitte, Apple Bank, and DAC, Nasser and Gordon will connect practical lessons from innovation cultures with real-world AI applications that move beyond efficiency to transformation. Nasser Sahlool, Senior Vice President, Strategy, DAC Gordon Levy, SVP, Head of Marketing, Apple Bank
11:00 AM	REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

11:30 AM

TRACK 1: RESILIENT BRAND

Chair: Stephen Diorio, Executive VP, Growth Strategy, GreenThread

CASE STUDY: GENERATIONAL SHIFT PLAYBOO

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.

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

TRACK 2: MODERN MARKETING CAPABILITIES

Chair: Adiele Aviram, Assistant VP, Head of Marketing, Affinity Markets, Manulife

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, VP, Growth Strategies, Meritrust Credit Union

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

Chair: Kate Brown, Chief Marketing Officer, Insurely

CASE STUDY: PROMPT {R} EVOLUTION

7 Archetypes That Transform AI into GTM Success

Perfect a next-gen playbook that future-proofs your brand and captures the attention of tomorrow's most valuable customers. Unlock the power of generative AI by mastering the art of prompting. In this fast-paced session, strategist Rick Lake unveils two powerful frameworks to elevate prompting from creative chaos to strategic advantage:

- Identify your team's AI maturity level using the 7 Evolutionary Prompt Archetypes - guiding individuals from experimentation to expert prompting.
- Apply the 7 Functional Prompt Archetypes to structure AI prompts that drive tangible go-to-market (GTM) outcomes - planning, messaging, content, compliance, and more.
- Build a scalable prompting system that boosts productivity, amplifies messaging, and delivers measurable GTM performance across your marketing operations.

Whether you're defining your target audience or optimizing your marketing mix, you'll walk away with a repeatable system that transforms AI from novelty to necessity.

Rick Lake, University Lecturer, Boston University

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: REFERRAL MARKETING

Harnessing Customer Advocacy for Cost-Efficient Growth in Uncertain Times

Economic headwinds and rising competition are making traditional acquisition channels less reliable and more expensive. Referral marketing provides a high-trust, low-cost alternative—turning satisfied customers into powerful brand advocates who drive new business and deepen loyalty. You will walk away with actionable strategies on:

- Positioning referral programs as a scalable, cost-efficient channel that outperforms paid acquisition during downturns.
- Designing and launching referral incentives that tap into trust, authenticity, and social proof.
- Measuring and continually optimizing the impact of advocacy to deliver sustained growth and resilience

Build a referral engine that fuels dependable customer acquisition, strengthens loyalty, and safeguards revenue when market conditions are uncertain.

Matt Roche, CEO, Extole

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

INDUSTRY EXPERT PRESENTATION: RE-IMAGINING WEBINAR MARKETING:

New innovations to transform advisor & client engagement

For financial services companies, digital engagement is the key to scaling the reach, and effectiveness, of advisor and client engagement. In this session, you will see new innovations in webinar marketing that will enable you to personalize every experience to drive better results and turn every webinar into an entire campaign of actionable content, creating a multiplier effect that will propel your business forward.

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

12:30 PM

TRACK 1: RESILIENT BRAND

CASE STUDY: FUTURE-PROOF BRAND DIFFERENTIATION

Building a Stand-Out Financial Brand with Technology, Bold Identity, and Customer-Centric Innovation

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:

- 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.

Leave equipped to differentiate your brand today and future-proof its relevance for the next decade.

Brian Clark, Vice President, Marketing & Communications, **Aspida**

TRACK 2: MODERN MARKETING CAPABILITIES

CASE STUDY: MODERN FINANCIAL MARKETING FOR ADVISORS

Empowering Advisors to Build Stronger Client Connections in a Digital Era

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:

- 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.

Transform advisor marketing strategies to align with evolving client expectations and market dynamics.

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

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

CASE STUDY: DATA-DRIVEN CONTENT STRATEGY

Blending Data, Brand, and Behavioural Insights to Drive Engagement and Loyalty

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:

- 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.

Amplify behavioural science and data to create content that attracts and deeply resonates, driving meaningful connections and lasting loyalty.

Kate Brown, Chief Marketing Officer, **Insurely**

1:00 PM

NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

2:00 PM

TRACK 1: RESILIENT BRAND

Chair: Adiele Aviram, Assistant VP, Head of Marketing, Affinity Markets, Manulife

PRESENTATION: WORK AROUND THE WORK

Elevating Marketing’s Credibility and Influence in the C-Suite

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:

- 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.

Position yourself and your team as indispensable growth partners who shape, rather than follow, enterprise strategy.

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

TRACK 2: MODERN MARKETING CAPABILITIES

Chair: Stephen Diorio, Executive VP, Growth Strategy, GreenThread

CASE STUDY: FUTURE-PROOF GROWTH-DRIVEN MARKETING

Streamlining Content Supply Chains and Roles for an AI-Driven Landscape

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:

- 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.

Equip your organization to thrive in an AI-driven future by blending automation, new capabilities, and measurable business outcomes.

Danelle Morrow, SVP Strategic Response Management, **Vanguard**

Stephen Diorio, Executive VP, Growth Strategy, **GreenThread**

MODERATOR

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

Chair: Kate Brown, Chief Marketing Officer, Insurely

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.

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

WWW.FINANCIALDIGITALMARKETINGUS.COM #DMFSNY

FULL AGENDA

DAY 1 - Thursday, November 6, 2025

2:30 PM

TRACK 1 CONTINUED: RESILIENT BRAND

INDUSTRY EXPERT PRESENTATION: SHAPING WHAT'S NEXT

How AI and Composable Tech Unlock Creativity and Strategy

Financial services marketers are entering a new era where AI and composable SaaS technologies are reshaping how work gets done. Done well, this shift goes beyond efficiency — it frees teams from repetitive tasks and enables more focus on creativity, strategy, and building meaningful customer experiences.

This session will explore how accelerators and AI-driven tools make it possible to launch faster, adapt to change, and stay compliant without sacrificing quality. Attendees will gain practical insights into harnessing modern digital frameworks to reimagine marketing's role and unlock new opportunities for innovation in financial services.

Sam Goble, Digital Strategist,
Xcentium

TRACK 2 CONTINUED: MODERN CAPABILITIES

INDUSTRY EXPERT PRESENTATION: SEARCH+ STRATEGY

Reframing Paid and Organic for the AI-Powered Search Era

AI-driven search is rewriting the rules of visibility, competition, and credibility. As AI Overviews and Answer Engines reshape how consumers discover financial brands, marketing leaders must evolve how they plan, measure, and act across paid and organic. Learn strategies to:

- Build unified playbooks for AI-optimized search, ensuring organic and paid teams collaborate on visibility across traditional SERPs, AI Overviews, and Answer Engines.
- Identify and close content and keyword gaps through data-led audits that align technical SEO, SEM, and AI perception metrics.
- Implement cross-channel monitoring to track when priority terms lose position or when AI Engines shift brand visibility, enabling rapid tactical response.
- Redesign your measurement framework to include AI perception, Answer Engine citations, and cross-funnel performance to future-proof your search investments.

Learn how to stay discoverable, credible, and efficient in an AI-first search landscape.

Eric Hoover, AI Optimization & SEO Director, Search+ Center of Excellence, **Kepler**

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

INDUSTRY EXPERT PRESENTATION: ORGANIC GROWTH IN THE AGE OF AI SEARCH Generative Engine Optimisation (GEO) for Modern FinServ Brands

This session unpacks how generative AI is redefining digital visibility for financial brands. It reframes growth around three pillars - visibility, or how often a brand appears in AI-generated results; citability, or how reliably engines reference its content as an authority; and retrievability, or how efficiently that content is surfaced and contextualized by AI systems. Through the lens of Generative Engine Optimization (GEO), it explores how FinServ marketing leaders can engineer their content and technology ecosystems to stay discoverable, trusted, and contextually relevant in an AI-first search environment.

Kishan Panpalia, Founding
Team, **Pepper Content**

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

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 C: 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 Live Polls, 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: IMPROVING
AI SEARCH VISIBILITY FOR
BANKING & FINANCIAL
SERVICES

As large language models (LLMs) transform how people discover information, the rules of visibility are shifting. Traditional SEO strategies—while still essential—must now align with how AI systems retrieve, rank, and generate responses. In this session, we'll explore how LLMs work behind the scenes, the evolving criteria brands need to meet to earn visibility in AI-driven search, and the key overlaps (and differences) with conventional SEO.

- You'll walk away with a clear understanding of:
- How LLMs process and surface information
- The criteria AI models use to determine trusted, useful content
- How to adapt SEO strategies to improve performance in AI-driven search environments

Wayne Cichanski, VP, Search & Site Experience, **iQuanti**

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

INDUSTRY EXPERT
PRESENTATION:
TRANSFORMING DIGITAL
EXECUTION IN FINANCIAL
SERVICES

Driving Growth, Speed, and
Trust with AI

Modern financial institutions are under pressure to move faster without compromising compliance or security. Learn how leading digital teams are unifying planning, collaboration, execution, and measurement to deliver high-impact digital experiences at scale. Take back to your office strategies to:

- Accelerate time-to-market for digital campaigns while maintaining regulatory compliance and enterprise-grade security.
- Empower marketers with AI-driven tools that enable personalized experiences and measurable performance improvements.
- Connect digital initiatives directly to business outcomes such as revenue growth, customer retention, and lifetime value.

See how financial services leaders are transforming fragmented workflows into a connected digital ecosystem built for compliance, optimized for ROI, and powered by AI.

Jamison Ethington, VP of Digital, **Wellby**

Jon Price, Technical Sales Engineer, **C2**

Lauren Ondersma, Account Executive, **C2**

Cuneyt Uysal, Strategic Account Executive, **Optimizely**

MODERATOR

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**
Alice Milligan, Board of Advisors, **SundaySky**
Elli Plihczik, Director of Strategy, **Demand Spring**
Jonathan Milne, VP, AI, **Demand Spring** MODERATOR

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**
Stephen Diorio, Executive Vice President Growth Strategy, **GreenThread** MODERATOR

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 Stephen Diorio, Executive Vice President Growth Strategy, GreenThread
9:00 AM	KEYNOTE FIRESIDE CHAT: Practical keys for using data and AI to enable your Go to Market Learn practical ways that TIAA is accelerating growth by infusing and embedding and analytics into their go to market. Hear best practices about ways you can use AI enabled insights and intelligence (from blu) to : <ul style="list-style-type: none">Target much more specific audiences with first party data signals, third party augmentation data, targeted media and persona based contentOrchestrate paid, owned, earned and shared media into highly coordinated campaignsCreate feedback loopsTake the time, cost and complexity out of targeting and personalizing your go to market programs on an account, persona and individual level at scale. <i>Learn how to AI and advanced analytics can help you execute a connected media strategy that harnesses the full potential of your media investments to build the brand, drive revenue, and multiply business impact</i> Jacob Holtgrewe, Global Head of Digital Marketing and Media, TIAA
9:30 AM	INDUSTRY EXPERT PRESENTATION: SOCIAL, SEARCH, & REPUTATION 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: <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. <i>Amplify the collective impact of social, search, and influence to expand visibility and deliver continuous growth.</i> James Morse, Vice President, Product Marketing, SOCi

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: <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.Update measurement frameworks to accurately track performance across today's fragmented, privacy-focused media ecosystem. <i>Optimize your brand's ability to succeed in a transforming media environment through an agile, integrated channel strategy.</i> Angela Giombetti, Chief Marketing Officer, Wealthspire Advisors Matthew Lindenberg, SVP/Chief Marketing Officer, Kearny Bank Andrew Agnello, Principal, Digital Marketing, Chartis <small>MODERATOR</small>
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. <i>Led by Denise Milano Sprung, Chief Marketing Officer, Miltin Financial</i> ROUNDTABLE B: AI GOVERNANCE IN MARKETING. Reducing Bias, Preventing Hallucinations, and Navigating Compliance Risks. <i>Led by Bruce Schneider, Enterprise Account Executive, Kaltura</i> ROUNDTABLE C: CREDIT UNION MERGER SUCCESS. Turning Member Consent into Long-Term Loyalty and Growth. <i>Led by Emily Stewart, VP, Growth Strategies, Meritrust Credit Union</i> ROUNDTABLE D: FROM CLICK TO CONVERSION, OPTIMIZING HIGH-COST TRAFFIC IN FINANCE. Turning \$20-\$40 CPCs into ROI through smarter post-click experiences. <i>Led by Garrett Schultz, Head of Business Development, Convincely</i> <i>Co-led with Grace Connolly, former Digital Experience Designer, AIA</i> ROUNDTABLE E: DATA-DRIVEN STORYTELLING. Building a Beloved Brand in a Hated Industry. <i>Led by Kate Brown, Chief Marketing Officer, Insurely</i> ROUNDTABLE F: SEARCH & AI SYNERGY. Aligning AI-Powered Intent Signals with Paid and Organic Search Strategies.

Led by **Lan Wright**, Chief Strategy Officer, **IXI Network, Equifax**

ROUNDTABLE G: ADVISOR AI TOOLKIT. Practical Dos and Don'ts for Building a Personal Brand.

Led by **Angela Giombetti**, Chief Marketing Officer, **Wealthspire Advisors**

12:00 PM

TRACK 1: MANAGING CHANGE & RISK

INDUSTRY EXPERT PRESENTATION:

Leading the Shift: Modern Marketing in a Legacy Industry

Financial services is undergoing a quiet revolution and marketing is at the center of it. In this candid fireside chat, top marketing leaders share how they're evolving trusted, regulated brands while staying rooted in credibility and compliance. Walk away with key insights on:

- Scaling authentic client experiences in a digital-first world, where AI, personalization, and human connection must work in harmony
- Balancing tradition with transformation to lead teams through rapid change
- Future-proofing a marketing organization in one of the world's most legacy-bound industries
- Reimagine your brand strategy, navigate compliance with creativity, and learn to lead with more impact
- Reimagine your brand strategy, navigate compliance with creativity, and learn to lead with more impact.

Reimagine your brand strategy, navigate compliance with creativity, and learn to lead with more impact.

Devin Kerr, Associate Vice President, Marketing, **Nasdaq**

Gregory Yates, Head of Marketing, Financial Servicesg, **Goldcast**

TRACK 2: BUILDING CAPABILITIES

INDUSTRY EXPERT PRESENTATION: PRECISION IN A BROAD MARKET:

How First-Party Data Fueled Kiavi's Paid Media Breakthrough

Financial services marketers face a unique dilemma: broad customer pools and strict compliance requirements make precision targeting difficult, and scaling spend without sacrificing efficiency even harder. Kiavi, one of the nation's largest private lenders, partnered with Level Agency to overcome this challenge by transforming their first-party data into a targeting engine that trained platforms like Google and Meta to recognize high-quality prospects earlier in the funnel. The result was improved lead quality, stable acquisition costs, and the confidence to diversify their media mix beyond search. In this session, you'll learn how to:

- Navigate compliance and scale challenges unique to financial services marketing.
- Translate first-party data into actionable customer models that improve platform targeting.
- Increase lead quality and throughput while maintaining efficiency.
- Confidently diversify your paid media mix beyond search.

Josh Muskin, Vice President, Sales, **Level Agency**

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

INDUSTRY EXPERT PRESENTATION: BEYOND THE LEAD FUNNEL

Automating Campaign Planning, Budget Allocation, and ROI Optimization

Traditional lead generation often fails to deliver the deal size and speed that Sales requires in the relationship-driven Financial Services sector. Discover the proven methodology used by one organization to transform their GTM strategy and align marketing with high-value revenue goals. Create a roadmap to:

- The "show, don't tell" strategy used to secure executive and Sales buy-in by replacing strategic decks with tangible pipeline results from targeted pilots.
- The essential data and platform requirements needed to establish clean account intelligence, integration protocols, and scale orchestration to high-value firms.
- Proven omni-channel tactics that deliver significant engagement lift and shift internal reporting from lead volume to account-level pipeline velocity.
- Learn how to drive a business transformation that aligns marketing with how your most strategic customers actually buy.

Emma Thomas, Director of Marketing, **Securian Financial Group, Inc.**

Mike Bentley, ABM Marketing Consultant, **Securian Financial Group, Inc.**

Sam Archbold, Head of Marketing Technology & Operations, **Securian Financial Group, Inc.**

12:30 PM

TRACK 1: MANAGING CHANGE & RISK

CASE STUDY: THE POWER OF THE UNSCALABLE

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: 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.

Brent Korte, Chief Marketing Officer & Senior Vice President, **Ameritas**

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

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, **Prudential Financial**

FULL AGENDA

DAY 2 - Friday, November 7, 2025

1:00 PM NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

2:00 PM INDUSTRY EXPERT PRESENTATION: RETHINKING MARTECH THROUGH THE AI LENS

How AI is Transforming Traditional Marketing Tools and Workflows, and Future Martech Strategies.

Marketing technology is being rewritten. AI isn't just another tool in the stack — it's redefining how the stack itself works.

How Martech Is Evolving

- From automation to autonomy, where tools make contextual decisions.
 - From fragmented data to connected intelligence that learns across channels.
 - From dashboards to co-pilots that reason, predict, and create alongside marketers
- What This Means for Marketers

What This Means for Marketers

- Every touchpoint — website, CRM, ad platform — must now serve both humans and AI agents.
- Optimization shifts from keywords and clicks to meaning and machine readability.
- Creativity becomes data-informed and dynamically personalized at scale.

The Innovation

- Reimagine martech as an ecosystem of learners, not a toolkit of automations.
- Build AI-first workflows that reduce lag between insight and action.
- Experiment relentlessly — every workflow is an opportunity to reinvent.
- AI won't replace marketers — but marketers who embrace AI will replace those who don't. (Currently relevant take)
- The next era of martech belongs to innovators who can blend creativity with computation and design for both people and machines

Raghu Vasu, Head of MarTech & Digital Transformation, Citi

Ankur (AJ) Goyal, CEO, Fibr AI

2:30 PM

TRACK 1 CONTINUED:
RESILIENT BRAND

**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.

Angelica Montagano, Head of Brand Experience, PwL Capital

Rick Lake, University Lecturer, Boston University

Vitthal K. Parker, Vice President, Marketing Strategy Lead, JP Morgan & Chase

Mike Zusel, Director of Strategic Accounts, Stensul

MODERATOR

TRACK 2 CONTINUED:
MODERN 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.

Rashim Parmar, Senior Manager, Software engineering, Advertising Technology, Discover

Jake Abraham, Head of Strategic Partnerships, EMS, Experian

Adiela Aviram, Assistant Vice President, Head of Marketing, Affinity Markets, Manulife

MODERATOR

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.

Sarah Madden, Growth Marketing & Communications Lead, BOXX Insurance

Paul Bell, President, 33Across

Ian Wright, Chief Strategy Officer, IXI Network, Equifax

MODERATOR

FULL AGENDA

DAY 2 - Friday, November 7, 2025

3:15 PM INDUSTRY EXPERT PRESENTATION: NEXT GEN FINANCE

How Fintechs Earn Gen Z's Trust

Gen Z now wields over \$140 billion in spending power and is shaping the future of financial services. But they don't engage with traditional performance marketing, they engage with brands that invest in their future. This session explores how fintechs can use "value-first" campaigns to outperform ads in both trust and ROI. You'll learn how to meaningfully connect with Gen Z through messaging frameworks rooted in authenticity, transparency, and purpose, plus proven channel strategies that actually drive engagement. Walk away with practical tactics to turn Gen Z awareness into genuine connection and long-term brand loyalty

Carlos Aguilera, Director of Brand Partnerships, **ScholarshipOwl**

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

4:15 PM CASE STUDY:

Safeguarding Brand Trust in the Age of Generative Content

As AI becomes a true teammate in the creative process, the opportunity to accelerate content creation has never been greater — nor have the risks. In this fireside chat, Bill Snider, Chief Strategy and Innovation Officer at Clearview Federal Credit Union, joins Jaime Punishill, Chief Product Officer at Lytho/Stephen Diorio, to explore how forward-thinking organizations are balancing innovation with governance to protect their brand and their customers' trust. Discover how to:

- Reimagine AI as a teammate — a creative partner that enhances, not replaces, human ingenuity.
- Build oversight into every phase of the content lifecycle — from creation to activation, personalization, optimization, and distribution.
- Leverage data to develop an atomic understanding of your content assets and componentry for better insight, development processes, and control.
- Empower teams to move fast with "enablement at the edge" while embedding compliance and brand integrity at the core.

Join this conversation to see how innovation, structure, and trust can coexist — and how the most disciplined brands will be the ones that lead with creativity.

Bill Snider, Chief Strategy & Innovation Officer, **Clearview Federal Credit Union**

Stephen Diorio, Executive Vice President Growth Strategy, **GreenThread** MODERATOR

4:45 PM INDUSTRY EXPERT PRESENTATION: ATTENTION IS THE NEW INTEREST RATE

How Financial Brands Are Competing in the Economy of Trust

Financial brands aren't just competing with each other; they're competing with everyone in the feed. Charlie Grinnell, Co-CEO of RightMetric, reveals how creators are rebuilding financial trust one post at a time and what that means for banks navigating today's attention economy.

- Attention Is the New Interest Rate: Growth now depends on cultural fluency, not just conversion funnels.
- Blind Spots Kill Growth: Learn where traditional analytics fail and what external signals to track instead.
- Authenticity Scales: Real creators build trust faster than campaigns ever could.
- Transparency Wins: Showing your math, margins, systems, or struggles earns credibility and replay value.
- Outsight over Insight: Build strategies from what is happening outside your brand walls

Drawing from RightMetric's latest research, this session shows how credit cards, small-business financing, and mortgage brands can earn attention through empathy, transparency, and cultural fluency before it converts elsewhere.

Charlie Grinnell, Co-CEO, **RightMetric**

5:15 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

REGULAR TICKET

\$1,990.00

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

REGULAR TICKET

\$1,495.00

REGISTER FOR DELEGATE PASS

Contact:

Sam Caskey

Delegate Registration Manager

Email: sam.caskey@strategyinstitute.com

GROUP RATES

Enhance your team collaboration, ROI, and industry presence with our existing group discounts for groups of 3+.

Speak with **Sam** about our best rates:

Email: sam.caskey@strategyinstitute.com

12th Annual

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

NOVEMBER 6-7, 2025

NEW YORK HILTON MIDTOWN