

13th Annual

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

## Post Event Report

November 6-7, 2025

New York Hilton Midtown,  
New York City, NY



Brought to you by:



# Where Digital Marketing, Growth, and Experience Leaders Redefine Customer Relationships in Financial Services

The Digital Marketing for Financial Services New York Summit 2025 (DMFS NY 2025) convenes the most influential, innovative, and forward-thinking leaders across banking, credit unions, insurance, wealth, payments, lending, and fintech to accelerate the future of financial marketing.

As the flagship edition of the DMFS series, DMFS NY empowers senior marketers to navigate economic volatility, rapid technological disruption, generational shifts, and escalating customer expectations all while driving compliant, scalable, and high-impact growth.

With strategy, innovation, and intelligence at its core, DMFS NY explores the critical capabilities reshaping the financial marketing landscape:

- **AI-powered marketing and automation** delivering personalization at scale
- **Data-driven demand generation and pipeline acceleration** that translate spend into measurable impact
- **Predictive analytics and integrated martech ecosystems** that unlock speed, efficiency, and operational excellence
- **Cross-channel content, brand, and digital experience strategies** that deepen trust and loyalty
- **Leadership, governance, and change-enablement frameworks** that empower teams to execute transformation
- **Privacy, compliance, and responsible AI practices** embedded across every marketing decision

Serving regional institutions, national financial brands, global enterprises, and rising fintech disruptors, DMFS NY 2025 equips marketing organizations to modernize execution, uplift performance, and convert customer intelligence into sustainable growth.

This is where financial marketers set new standards, redefining what's possible at the intersection of technology, creativity, and customer experience.

Immerse yourself in the DMFS NY Experience: Watch the 2025 Highlight Video Here

Watch the 2025 Highlight Video Here



# DMFS NY in Numbers



**140+**  
Attendees



**40+**  
Speakers



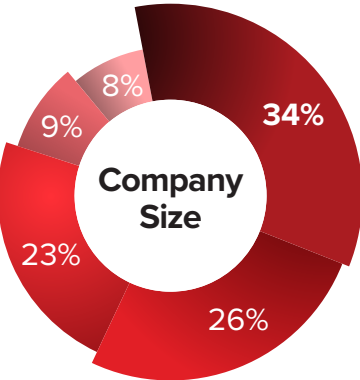
**20+**  
Hours of Content



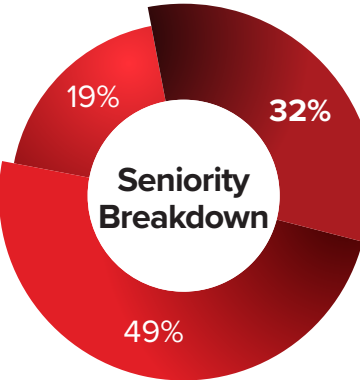
**10+**  
Hours of Networking



**60%**  
of attending  
companies have  
1000+ employees

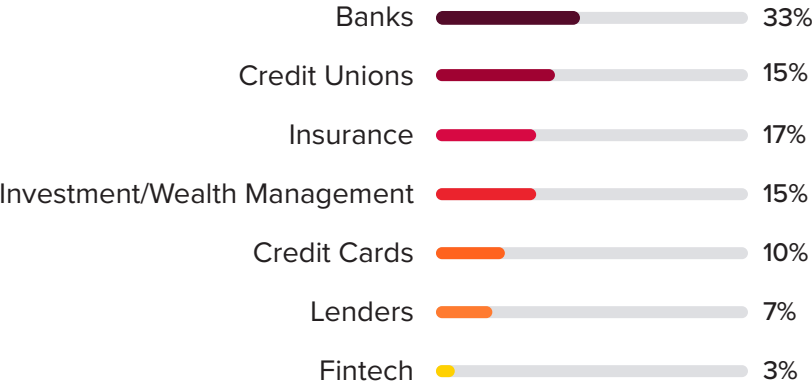


- 34% 10,000+ Employees
- 26% 1001-10,000 Employees
- 23% 201-1,000 Employees
- 9% 50-200 Employees
- 8% Under 50 Employees



- 32% VP/C-Suite
- 49% Director/ Manager
- 19% Marketing Specialist

## MARKET SEGMENTS



# Hear From Our DMFS NY Community



I am enjoying the mix of both leadership advice and industry advice. I can't wait to share this knowledge with my team



Amazing programming, strong sessions, well-run.



As a first-time attendee I walked away inspired with a list of action items to improve things



Thank you for inviting me to the 2025 DMFS Summit in NYC. The sessions were first rate, the speakers were worldclass & the networking was incredible. Can't wait to see you in charlotte in May!



This conference was a refreshing experience of industry knowledge, networking, and growth opportunities. I look forward to next year



DMFS was very educational and through provoking. Having a space for my direct vertical is game changing.



# Discover, Network, Transform



## Discover

Hear from the most innovative marketing, digital, and growth leaders across U.S. financial services as they reveal how to translate AI, data, and martech investments into measurable business outcomes. Gain practical strategies for boosting acquisition, deepening engagement, and unlocking revenue lift through AI-driven personalization, integrated marketing ecosystems, intelligent content automation, and compliant customer experiences built for banking, credit unions, wealth, insurance, payments, and fintech.

## Network

Connect with senior-level marketing, brand, digital experience, and demand generation executives from America's leading financial institutions. Through keynotes, panel discussions, speed networking, roundtables, and an evening reception, forge strategic partnerships that accelerate transformation across retail and commercial banking, investment management, fintech, and digital-first financial services. Meet change-makers from organizations including Northwestern Mutual, Neuberger Berman, Pacific Premier Bank, TIAA, Goldman Sachs, and more.

## Transform

Learn from the organizations actively redefining marketing's impact on enterprise value. Master how to unify data and platforms, scale automation and personalization, prove ROI with advanced attribution, and influence cross-functional decision-making. Walk away ready to elevate marketing as a true growth engine, driving customer loyalty, operational efficiency, and long-term competitive advantage in an accelerating digital landscape.

# Driving Customer Growth Through Impactful Digital Marketing & Experience Strategies

The **DMFS New York Summit** convenes the most innovative marketing and digital leaders from across U.S. financial services to accelerate customer growth and deepen loyalty in a rapidly evolving landscape. The focus is clear: modern financial marketing must combine AI-powered intelligence, agile execution, and compliant creativity to generate measurable revenue impact and protect brand trust.

Over two days in New York City, attendees gain the playbooks to unify data and platforms, operationalize AI responsibly, advance personalization at scale, and prove marketing’s strategic value enterprise-wide across banking, insurance, payments, wealth, and fintech.

## 5 Big Trends from DMFS NY 2025:

**Integrated Data & Martech Ecosystems:**  
  
Unified data foundations, connected execution layers, and scalable governance models are transforming fragmented tools into cohesive growth engines, enabling faster, insight-led decisioning.

01

**Bold Creativity with Compliance Confidence:**  
  
Brands are taking calculated creative risks and architecting workflows that embed risk-reward analysis and regulatory review into every stage of production, unlocking differentiation in a regulated environment.

02

**Attribution, Measurement & ROI Accountability:**  
  
Sessions revealed how scalable automation, unified customer data, and composable tech stacks are eliminating manual work and speeding execution — enabling rapid test-and-learn cycles and governance at scale.

03

**Experience-Led Engagement & Journey Orchestration**  
  
Case studies demonstrated how agile teams adjust messaging mid-flight, unlock collaboration across departments, and respond quickly to economic and behavioral shifts — producing faster wins and visible ROI.

04

**AI-Enhanced Personalization & Autonomous Messaging**  
  
Financial marketers are leveraging AI to tailor campaigns in real time, optimize content creation, and streamline compliance through automated guardrails, improving speed and conversion without sacrificing trust.

05

[View Our DMFS MW Content Hub](#) →

# Our Speakers

[VIEW AGENDA →](#)



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



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



**Daniel Darst**  
Deputy CMO  
**Flagstar Bank**



**Jacob Holtgrewe**  
Managing Director & Global Head  
Content & Product Marketing  
**Goldman Sachs**



**Vickie Sherman**  
Chief Marketing Officer & SVP  
**Pacific Premier Bank**



**Henry Detering**  
Chief Marketing Officer  
**Neuberger Berman**



**Arthur Silva**  
SVP, Head of Digital Engagement  
& Martech Solutions  
**Fidelity Institutional**



**Hunter Hoffman**  
Chief Marketing Officer  
**Starr Insurance**



**Matthew Lindenberg**  
SVP & Chief Marketing Officer  
**Kearny Bank**



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

# Our Speakers

[VIEW AGENDA →](#)



**Angela Giombetti**  
Chief Marketing Officer  
Wealthspire Advisors



**Brent Korte**  
Chief Marketing Officer & SVP  
Ameritas



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



**Vitthal K. Parker**  
VP, Marketing Strategy Lead  
JP Morgan & Chase



**Med Yacoub**  
Marketing Director  
Tradesk



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



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



**Allison Yazel**  
VP, Marketing  
Manna Tree



**Brian Clark**  
VP, Marketing &  
Communications  
Aspida



**Kate Purdy**  
VP, Marketing & Digital  
Signal Financial FCU

# Our Speakers

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



**Gordon Levy**  
SVP, Head of Marketing  
**Apple Bank**



**Nasser Sahlool**  
SVP, Strategy  
**DAC**



**James Morse**  
VP, Product Marketing  
**SOCi**



**Andrew Agnello**  
Principal, Digital Marketing  
**Chartis**



**Mark Bornstein**  
VP Marketing & Chief Evangelist  
**ON24**



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



**Andrew Riker**  
Associate Director, Digital  
Marketing  
**RBC Global Asset Management**



**Rashim Parmar**  
Senior Manager, Software  
Engineering (Ad Technology)  
**Discover**



**Jake Abraham**  
Head of Strategic Partnerships,  
EMS  
**Experian**

# Our Speakers

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**Sarah Madden**

Growth Marketing &  
Communications Lead  
**BOXX Insurance**



**Thanh Hong**

Strategic Account Executive  
**Kaltura**



**Stephen Diorio**

EVP, Growth Strategy  
**GreenThread**



**Jaime Punishill**

Chief Product Officer  
**Lytho**



**Mike Zusel**

Director of Strategic Accounts  
**Stensul**



**Ian Wright**

Chief Strategy Officer,  
IXI Network  
**Equifax**



**Paul Bell**

President  
**33Across**



**Carlos Aguilera**

Director of Brand Partnerships  
**ScholarshipOwl**



**Kishan Panpalia**

Founding Team  
**Pepper Content**



**Emily Stewart**

Director, Digital Marketing &  
Analytics  
**Meritrust Credit Union**

# Our Speakers

[VIEW AGENDA →](#)



**Angelica Montagano**  
Head of Brand Experience  
**PWL Capital**



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



# Activations and Experiences to Inspire and Energize



## Speed Networking

High-energy, timed sessions that maximize introductions to meet new peers, exchange cards, and spark quick connections.



## Roundtables

Fast-paced networking rounds designed to spark valuable introductions and share fresh ideas in minutes.



## VIP Breakfast, Lunch and Dinner Briefings

Meet one-on-one with leading solution providers and explore the latest data tools and technologies.



## Evening Reception

Relaxed breakfast and lunch gatherings that make it easy to start meaningful conversations and build lasting connections.

# 2025 Attending Organizations: Advancing Growth Through Digital Innovation & Marketing Strategy

The Digital Marketing for Financial Services New York Summit 2025 brings together senior marketing and digital leaders from across banking, credit unions, insurance, wealth, investment management, lending, cards, payments, and fintech, all united in accelerating customer growth, strengthening brand trust, and transforming marketing into a strategic business driver.

Over two days in New York City, attendees explore the future of financial marketing from AI-enhanced personalization, unified data and martech ecosystems, and modern customer journey orchestration, to creative risk-taking with embedded compliance and operational excellence. Leaders collaborate through keynotes, case studies, workshops, roundtables, and speed networking designed to unlock actionable frameworks that deliver measurable revenue, loyalty, and efficiency gains.

## A Selection of the Influential Organizations Represented:

- |                                                              |                                                                     |                                                                     |                                                                     |
|--------------------------------------------------------------|---------------------------------------------------------------------|---------------------------------------------------------------------|---------------------------------------------------------------------|
| <input checked="" type="checkbox"/> JPMorgan Chase & Co.     | <input checked="" type="checkbox"/> M&T Bank                        | <input checked="" type="checkbox"/> Block                           | <input checked="" type="checkbox"/> Swiss Re                        |
| <input checked="" type="checkbox"/> Bank of America          | <input checked="" type="checkbox"/> Huntington National Bank        | <input checked="" type="checkbox"/> Western Union                   | <input checked="" type="checkbox"/> Reinsurance Group of America    |
| <input checked="" type="checkbox"/> Citi                     | <input checked="" type="checkbox"/> Northern Trust Asset Management | <input checked="" type="checkbox"/> Vanguard                        | <input checked="" type="checkbox"/> Northwestern Mutual             |
| <input checked="" type="checkbox"/> Wells Fargo              | <input checked="" type="checkbox"/> BNY Mellon                      | <input checked="" type="checkbox"/> Fidelity Investments            | <input checked="" type="checkbox"/> Guardian Life                   |
| <input checked="" type="checkbox"/> Morgan Stanley           | <input checked="" type="checkbox"/> CIBC Mellon                     | <input checked="" type="checkbox"/> T. Rowe Price                   | <input checked="" type="checkbox"/> TIAA                            |
| <input checked="" type="checkbox"/> UBS                      | <input checked="" type="checkbox"/> NYSE                            | <input checked="" type="checkbox"/> Franklin Templeton              | <input checked="" type="checkbox"/> Navy Federal Credit Union       |
| <input checked="" type="checkbox"/> Barclays                 | <input checked="" type="checkbox"/> NASDAQ                          | <input checked="" type="checkbox"/> Principal Financial Group       | <input checked="" type="checkbox"/> American Eagle Financial Credit |
| <input checked="" type="checkbox"/> Deutsche Bank            | <input checked="" type="checkbox"/> CME Group                       | <input checked="" type="checkbox"/> Prudential Financial            | <input checked="" type="checkbox"/> Union                           |
| <input checked="" type="checkbox"/> TD Securities            | <input checked="" type="checkbox"/> S&P Global                      | <input checked="" type="checkbox"/> New York Life Insurance Company | <input checked="" type="checkbox"/> Municipal Credit Union          |
| <input checked="" type="checkbox"/> U.S. Bank                | <input checked="" type="checkbox"/> Moody's Corporation             | <input checked="" type="checkbox"/> MetLife                         | <input checked="" type="checkbox"/> Inter-American Development Bank |
| <input checked="" type="checkbox"/> Capital One              | <input checked="" type="checkbox"/> MarketAxess                     | <input checked="" type="checkbox"/> Allstate                        | <input checked="" type="checkbox"/> Capital Group                   |
| <input checked="" type="checkbox"/> Truist                   | <input checked="" type="checkbox"/> Mastercard                      | <input checked="" type="checkbox"/> Chubb                           | <input checked="" type="checkbox"/> Edward Jones                    |
| <input checked="" type="checkbox"/> Citizens Financial Group | <input checked="" type="checkbox"/> American Express                | <input checked="" type="checkbox"/> Aon                             |                                                                     |

# Our Sponsors

Meet the forward-thinking solution providers powering the future of financial services marketing. These sponsors are helping to reshape the industry, delivering AI-driven customer experiences, data-driven insights, and modern engagement strategies to accelerate growth and drive long-term loyalty.



# How to Register?

REGISTER YOUR INTEREST FOR 2026 →

## 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.

## REGISTER FOR DELEGATE PASS

### Contact:

Sam Caskey  
Delegate Registration Manager  
Email: [sam.caskey@strategyinstitute.com](mailto: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](mailto:sam.caskey@strategyinstitute.com)

|                                           |         |
|-------------------------------------------|---------|
| EARLY ACCESS<br>EXPIRES ON MAY 29TH, 2026 | \$1,095 |
| GROUP OF 3                                | \$3,000 |

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Financial Services  
Summit **NEW YORK**

OCTOBER 28-29 2026 | NEW YORK HILTON MIDTOWN