

13th Annual

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

October 28 & 29, 2026

New York Hilton Midtown

Practical Growth Playbooks for Financial Marketing Leaders



The Annual Conference in New York for Financial Marketing Teams Focusing on Brand, Data, AI, and Growth.



Financial marketers across the US face a common pressure: do more with less while navigating compliance, fragmented data, and rising customer expectations. The DMFS New York Summit brings together the country's most progressive financial marketing leaders to share the strategies and frameworks they're using right now to break through, practically, not theoretically.

Every session is designed for peer exchange and implementation. Expect hands-on workshops, facilitated roundtables, three-track programming, and direct access to speakers between sessions. You won't just absorb ideas, you'll stress-test them with colleagues who share your constraints, your industry, and your ambition to raise the bar.

2026 Summit **Highlights**

01

C-Suite Communication

Bolster a C-Suite communication framework that translates marketing ROI into financial language your CEO, CFO, and COO already use.

03

AI-First Search

Adapt your search strategy for an AI-first world, covering generative engine optimization, LLM visibility, and the overlap between traditional SEO and AI-driven discovery.

05

Legacy Brand Evolution

Rebrand a legacy financial institution without losing equity, compliance sign-off, or customer confidence in the process.

07

Doing More with Less

Advance and make a limited budget work harder through smarter targeting, CRM-led personalization, and a media mix built around measurable outcomes.

02

Brand Across Every Touchpoint

Optimize your brand across every customer touchpoint, from your website to underwriting to service SLAs, so every interaction earns trust rather than eroding it.

04

Crisis and Market Readiness

Achieve always-ready response playbooks that prepare your team to act within minutes when markets shift or a reputational threat emerges.

06

Building Trust in a Skeptical Market

Master a financial brand people believe in during a period when trust in the industry is at a low point.

08

Insurance Marketing Track

Explore the new dedicated Insurance Marketing Track, built around the biggest challenges insurers across the US are navigating right now.

Is Your Role Here?

If you work in any of the functions below, you'll take away practical strategies, frameworks, and peer-led insights you can apply immediately.

Marketing, Growth, & Acquisition

Digital Marketing, Growth, Performance, Acquisition, Paid Media, and Business Development

Brand, Content, & Communications

Brand, Content, Communications, CX, CRM/Lifecycle, and Social Media

Marketing Ops, Data, & Technology

Marketing Ops, Martech, Analytics, Data, and Personalization



Register Now →

Trusted by Leading Financial Institutions

Senior Marketers from many of North America's most recognizable financial brands participate in DMFS events.

Recent DMFS delegates and speakers include leaders from:



What Past Attendees Say

Don't just take our word for it! Here's what past delegates say about the takeaways, connections, and ROI.

The DMFS Summit was incredibly educational. I got real value from hearing about the latest industry changes from thought leaders and came away inspired to put what I learned into practice.



An incredible opportunity to network with marketing industry experts. I learned so much about leveraging AI for content and strategies that actually cut through.



A great event. As financial services institutions navigate the speed of innovation, it's valuable to hear how industry leaders are working through the same complex problems.



The sessions were relevant, interesting, and engaging. I appreciated the breakout sessions and thought the speakers were well-rounded.



Everyone here understands the unique challenges of financial services marketing. There was something to relate to with every single attendee.



Very relevant speakers, topics, and vendors for CMOs today.



As a first-time attendee, I walked away inspired with a clear list of action items to improve things back at work.



DMFS was educational and thought-provoking. Having a dedicated space for my vertical is genuinely game-changing.



A refreshing mix of industry knowledge, networking, and growth opportunities. I'm already looking forward to next year.



Agenda at a Glance

Eastern Std. Time	DAY 1 - Wednesday, October 28, 2026
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: Building Blocks For Branding
9:30 AM	Keynote Panel Discussion: Intelligent Content Engine
10:15 AM	Speed Networking! Make Meaningful Connections
10:30 AM	Industry Expert: Technology-Enabled Change Management
11:00 AM	Refreshments Break & Exhibitor Lounge: Visit Booths & Source Expertise
11:30 AM	Tracks: Resilient Brand / Modern Marketing Capabilities / Data & Ai Enabled Go-To-Market
12:00 PM	Industry Experts: Personalization That Pays Off / Referral Marketing / Re-Imagining Webinar Marketing
12:30 PM	Panel Discussion: From Brand Strategy To Revenue Strategy / Marketing To The Next Generation / SEO Vs Geo
1:00 AM	Networking Lunch & Exhibitor Lounge Visits
2:00 PM	Panel Discussion: Grassroots Marketing / Case Study: Martech Consolidation / Automation Powerhouse
2:30 PM	Industry Expert: Harmonize Personalization, Trust & Compliance / Search + Strategy / Insights To Activation
3:00 PM	Workshops: Elevating Advisor Positioning In Wealth & Asset Management / Utilizing Ai Without Losing The Human Touch / Financial Advisor Marketing / Strengthening Compliant Marketing Campaigns/ Connecting Digital And In-Branch Experiences
3:45 PM	Refreshments Break & Exhibitor Lounge:
4:15 PM	Industry experts: The future of Financial / Improving ai Search visibility / Transforming Digital Execution In Financial Services
4:45 PM	Panel Discussion: Speaking The Boardroom Lingo
5:15 PM	End Of Day One Summary & Closing Remarks
5:30 PM	Evening Reception: Enjoy Great Conversation, Music, & Networking
6:30 PM	Conference Adjourns To Day Two

Eastern Std. Time	DAY 2 - Thursday, October 29, 2026
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: One Vision, One Brand
9:30 AM	Industry Expert: Social, Search, & Reputation Convergence
10:00 AM	Panel Discussion: Strategic Response Management
10:45 AM	Refreshments Break & Exhibitor Lounge: Visit Booths & Source Expertise
11:15 AM	Roundtable Discussions: Crisis, Comms, & Control / Winning Attention In A Saturated Market / Brand In the Age Of Ai-Generated / The modern Marketing Team / Personalization At Scale / From Strategy To Execution / Beyond Price / Ai As The New Insurance Agent / Invisible Insurance
12:00 PM	Industry Experts: Brand Building In A Distrustful Era / Precision In A Broad Market/ Industry Expert: Beyond the Lead Funnel
12:30 PM	Case Studies: Leading The Shift / Maximizing Marketing Impact With Limited Budgets / Marketing In The Regulatory Spotlight
1:00 PM	Networking Lunch & Exhibitor Lounge Visits
2:00 PM	Industry Expert: Turning Brand Into A Measurable Growth Driver
2:30 PM	Panel Discussions: The Future Of Financial Brand Building / Building A High Performing Martech Stack / Automation Without Alienation
3:15 PM	Industry Expert: Centralized Customer Intelligence
3:45 PM	Closing Fireside Keynote Presentation: The Currency Of Certainty
4:15 PM	Refreshments Break & Exhibitor Lounge
5:00 PM	Closing Comments From Your Host
5:15 PM	Conference Concludes

Featured Speakers

[View All Speakers →](#)

Hear directly from senior marketing and growth leaders shaping digital strategy across banking, insurance, credit unions, wealth, and fintech with practical perspectives you can apply immediately.



Koley Corte

CMO & SVP, Investment Management & Retirement Solutions



Chief Marketing Officer



Lindsi Flynn



Chief Marketing & Underwriting Officer



Mark Gromek

Chief Marketing Officer



Jeff Beck



Vice President, Digital Marketing & GTM Value Creation



Nikita Sharkov



Chief Marketing Officer & Senior Vice President



Alletta Emeno



Mary Koomson

Director of Digital Marketing, EMEA APAC & US



Vice President, Marketing Strategy Lead



Vitthal Parker



Matthew Lindenberg

Chief Marketing Officer & Senior Vice President



Rena D'Andraia

Assistant Vice President, Marketing & Communications



Susan Guess

Chief Marketing Officer & Senior Vice President



Jonathan Hanson

SVP Of Marketing Strategy



Featured Speakers

[View All Speakers →](#)

Hear directly from senior marketing and growth leaders shaping digital strategy across banking, insurance, credit unions, wealth, and fintech with practical perspectives you can apply immediately.



Emily Stewart

Senior Vice President,
Growth Strategies 




Anna Papadopoulos

Principal, Head of
Growth Marketing 



Drew Hirsty

Director of Marketing 




Martina Gago

SVP, Content Strategy 



Melissa Kanter

Head of Communications
& Brand Experience,
Americas 



Abbas Merchant

Executive Managing
Director, Marketing |
Data & AI 

7:30–8:40 AM

Registration & Networking Breakfast: Build Community Contacts

- Start your day off right and connect with **financial marketing leaders**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices** and prepare for the day ahead.

8:40–8:45 AM

Welcome From Strategy Institute



Rebecca Mayoh-Davis
Production Manager
Strategy Institute

8:45–9:00 AM

Opening Remarks from the Chairperson

Gain insight into today’s sessions so you can get the most out of your conference experience.



Abbas Merchant
Chief Marketing Officer
Prowess Consulting

9:00–9:30 AM

Keynote Presentation: Building Blocks for Branding

How to Elevate Brand Strength at Every Touchpoint of the Member Experience

- Strengthen every touchpoint, which includes website, applications, service channels, underwriting, and communication SLAs.
- Perfect marketing, operations, lending, and technology to reduce friction and improve outcomes.
- Achieve organizational buy-in by demonstrating how brand experience directly impacts marketing performance.

9:30–10:15 AM

Keynote Panel Discussion: Intelligent Content Engine

How to Elevate Brand Strength at Every Touchpoint of the Member Experience

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



Martina Gago
SVP, Content Strategy
JP Morgan



Mark Gromek
Chief Marketing &
Underwriting Officer
Builders

10:15–10:30 AM

Speed Networking! -- Make Meaningful Connections

Grow your network by meeting like-minded individuals to share your latest ideas and projects with:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a **fun and agile fashion**.
- **Join a community** of marketing leaders and gain invaluable support.

10:30–11:00 AM

Industry Expert: Technology-Enabled Change Management

How to Build a Business Case and Momentum to Drive Change

- Transform your organization so that it is comfortable with innovation and identifying transformation projects.
- Enhance key stakeholders and secure buy-in for your vision.
- Adapt to changes and risk-taking from a leadership perspective.

11:00 -11:30 AM

Refreshments Break & Exhibitor Lounge: Visit Booths & Source Expertise

- Discuss ideas on how to **transform your organization** so it embraces innovation.
- **Share your challenges** in identifying transformative projects with peers.
- Schedule **one-to-one private meetings** for personalized advice.

11:30–12:00 PM

TRACK 1: RESILIENT BRAND

CASE STUDY: MODERNIZING LEGACY BRANDS

How to Rebrand without Risk

- Bolster internal alignment across leadership, compliance, and legal.
- Optimize changes seamlessly across channels to protect customer experience and brand consistency.
- Amplify the impact of your rebrand with metrics that matter to the board.

TRACK 2: MODERN MARKETING CAPABILITIES

CASE STUDY: PLAYING OFFENSE IN A DEFENSIVE RATE MARKET

How to Use Creative Product Design to Your Advantage

- Achieve a deposit product that stands out.
- Tap into local partnerships and fan loyalty to drive engagement.
- Refine both the product design and messaging based on what actually works.



Alletta Emeno
Chief Marketing Officer &
Senior Vice President
Ardent Credit Union

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

CASE STUDY: INTENT-DRIVEN FORECASTING

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

- Bolster unified data infrastructure that blends on-site behavior, CRM records, and external search intent for AI modeling.
- Strengthen and train forecasting models that translate search-volume shifts into early indicators of mutual-fund interest.
- Enhance marketing activity to revenue uplift that link intent clusters to actual inflows and business KPIs.



Jeff Beck
Chief Marketing Officer
CST Savings

12:00–12:30 PM

INDUSTRY EXPERT: PERSONALIZATION THAT PAYS OFF

How to Deliver Compliant, Scalable Customer Journeys in Financial Services

- Adjust and configure your marketing technology stack.
- Increase AI in your personalization strategy.
- Optimize your source data and how you pull content together to reach your personalization goals.

INDUSTRY EXPERT: REFERRAL MARKETING

How to Harness Customer Advocacy for Cost-Efficient Growth

- Bolster referral programs as a scalable, cost-efficient channel that outperforms paid acquisition during downturns.
- Improve, design, and launch referral incentives.
- Optimize and measure the impact of advocacy to deliver sustained growth and resilience.

INDUSTRY EXPERT: RE-IMAGINING WEBINAR MARKETING

How to Transform Advisor and Client Engagement

- Optimize new innovations in webinar marketing.
- Excel personalization of every experience so you get better results.
- Master a multiplier effect that will propel your business forward.

12:30–1:00 PM

CASE STUDY: FROM BRAND STRATEGY TO REVENUE STRATEGY

How to Drive Growth

- Amplify where brand investment is driving revenue.
- Align internal stakeholders around a brand strategy that delivers both immediate results and sustained growth.
- Enrich the channels, campaigns, and activities that generate the highest return on brand investment.

PANEL DISCUSSION: MARKETING TO THE NEXT GENERATION

How to Shift Strategies and Engage Younger Generations

- Increase platform-native tactics like short-form video, creators, and interactive tools that drive authentic engagement on social media.
- Master values-driven storytelling frameworks that align financial products with younger consumers' priorities.
- Strengthen measurement and feedback loops.

PANEL DISCUSSION: SEO VS GEO

The Battle for Visibility in the AI Search Era

- Identify the content, authority, and trust signals that influence AI-generated responses
- Develop measurement frameworks that account for visibility beyond clicks and traffic
- Build a future-ready search strategy that balances SEO fundamentals with emerging GEO opportunities.



Melissa Kanter
Head of Communications &
Brand Experience, Americas
ING



Vitthal Parker
Vice President,
Marketing Strategy Lead
JPMorganChase

1:00–2:00 PM

Networking Lunch & Exhibitor Lounge Visits

- Meet interesting speakers and pick their brains on the **latest industry issues**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **financial marketing colleagues**.

2:00–2:30 PM

TRACK 1 CONTINUED: RESILIENT BRAND

PANEL DISCUSSION: GRASSROOTS MARKETING

How to Create a Home-Grown Marketing Strategy That Speaks to Your Brand

- Establishing campaigns that connect with the community and build organic relationships that convert into new clients.
- Creating a story that involves the consumer in a journey, creating increased customer loyalty.
- Gaining a competitive edge by establishing yourself as the preferred, trusted local partner for financial needs.



Jonathan Hanson
SVP Of Marketing Strategy
VyStar Credit Union

TRACK 2 CONTINUED: MODERN CAPABILITIES

CASE STUDY: MARTECH CONSOLIDATION

How to Cut Tools While Lifting Performance

- Optimize a proven audit framework to identify overlaps, under-utilized tools, and hidden licensing drain.
- Strengthen data-driven criteria for deciding which platforms to sunset, replace, or elevate.
- Perfect management tactics to migrate users, centralize data, and reinvest savings into high-impact capabilities.

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

CASE STUDY: AUTOMATION POWERHOUSE

How to Eliminate Repetitive Tasks to Free Up Teams

- Identify high-value automation opportunities to eliminate manual bottlenecks.
- Adapt and integrate the right tools, such as RPA and marketing automation platforms.
- Transform governance and monitoring to ensure automated workflows maintain quality, compliance, and brand consistency.

2:30–3:00 PM

INDUSTRY EXPERT: HARMONIZE PERSONALIZATION, TRUST & COMPLIANCE

How to Create Intelligent Customer Experiences

- Master secure and compliant hyper-personalized interactions.
- Advance the emotional promise of your brand into every channel.
- Bolster data, technology, and teams to build customer-centric engagement.

INDUSTRY EXPERT: SEARCH + STRATEGY

How to Reframe Paid and Organic for the AI-Powered Search Era

- Enhance unified playbooks for AI-optimized search, ensuring organic and paid teams collaborate on visibility.
- Optimize and close content and keyword gaps through data-led audits.
- Strengthen cross-channel monitoring to track when priority terms lose position or when AI Engines shift brand visibility.
- Perfect your measurement framework to include AI perception, Answer Engine citations, and cross-funnel.

INDUSTRY EXPERT: INSIGHTS TO ACTIVATION

Insights, Data Collaboration, Clean Rooms, and Activation for Smarter Engagement

- Blending first-party and third-party data for a 360° customer view that enhances targeting and personalization.
- Leveraging secure data collaboration and clean rooms to uncover shared insights and enrich campaigns without compromising customer privacy.
- Implementing advanced measurement frameworks that connect insights to marketing outcomes and demonstrate ROI.

3:00–3:45 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: ELEVATING ADVISOR POSITIONING IN WEALTH & ASSET MANAGEMENT

Strengthening Market Presence, Client Engagement, and Thought Leadership

- Define and communicate a value proposition that resonates with both clients and intermediary partners.
- Equip advisors with content and thought leadership tools to guide client conversations and navigate market events in real time.
- Align internal storytelling and brand positioning to enhance credibility and market presence.

WORKSHOP B: UTILIZING AI WITHOUT LOSING THE HUMAN TOUCH

Transforming Content Production While Preserving Brand Integrity and Human Insight

- Optimizing performance creative through rapid testing, iteration, and insight generation.
- Blending AI and human creativity to enhance content development without compromising brand voice or trust.
- Establishing governance and guardrails that ensure responsible, compliant, and brand-safe use of AI tools.

WORKSHOP C: FINANCIAL ADVISOR MARKETING

How to Better Drive Sales and Brand Consistency

- Optimize advisors with branded content, digital platforms, and compliant marketing resources.
- Bolster data-driven personalization and tailored solutions.
- Perfect a culture of continuous learning and collaboration.

WORKSHOP D: STRENGTHENING COMPLIANT MARKETING CAMPAIGNS

How to Drive Marketing Innovation in a Regulated Industry

- Advance regulatory requirements as strategic guardrails rather than barriers to marketing innovation.
- Transform internal approval and governance processes to support faster campaign execution.
- Master emerging technologies, such as AI and advanced personalization.

WORKSHOP E: CONNECTING DIGITAL AND IN-BRANCH EXPERIENCES

How to Build a True Omnichannel Customer Journey

- Reduce the gaps where digital engagement and frontline conversations fail to connect.
- Master steps for strengthening the connection between digital engagement and in-person customer experiences.
- Bolster your branch teams' ability to continue conversations in digital channels.



Anna Papadopoulos,
Principal, Head of Growth Marketing
Edward Jones

3:45–4:15 PM

Refreshments Break & Exhibitor Lounge: Attend Vendor Demos & Consult Industry Experts

- Enjoy **exclusive sponsor demos** and experience the next level of financial marketing innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

4:15–4:45 PM

TRACK 1 CONTINUED: RESILIENT BRAND

INDUSTRY EXPERT: THE FUTURE OF FINANCIAL MESSAGING

How to Drive Growth with an Autonomous Lifecycle

- Perfect how you shift from static sends to messaging systems that evolve.
- Master smarter message timing and cadence using AI.
- Enrich dynamic, real-time content and boost engagement with Live Polls, Live Tracking, Live Social, and personalized offers.
- Optimize streamlined compliance
- Excel scalable messaging architecture

TRACK 2 CONTINUED: MODERN CAPABILITIES

INDUSTRY EXPERT: IMPROVING AI SEARCH VISIBILITY

How to Increase Search Visibility for Banking & Financial Services

- Increase how LLMs process and surface information.
- Optimize the criteria AI models use to determine trusted, useful content.
- Adapt SEO strategies to improve performance in AI-driven search environments.

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

INDUSTRY EXPERT: TRANSFORMING DIGITAL EXECUTION IN FINANCIAL SERVICES

How to Drive Growth, Speed, and Trust with AI

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

4:45–5:15 PM

Panel Discussion: Speaking The Boardroom Lingo

How to Communicate Value to the C-Suite

- Increase communication of the ROI of marketing campaigns in terms your CEO will understand.
- Achieve a deeper understanding of the metrics being utilized by the business layer.
- Adapt marketing metrics in financial terms and align campaigns with enterprise priorities.



Nikita Sharkov

Vice President, Digital Marketing & GTM
Value Creation
Long Arc Capital



Rena D'Andraia

Assistant Vice President, Marketing & Communications
Heritage Credit Union



Lindsay Flynn

Chief Marketing Officer
US Mortgage Corporation

5:15–5:30 PM

End of Day One Summary & Closing Remarks

Review the key solutions and takeaways from today's sessions. Source a summary of action points to implement in your work. Discuss tomorrow's highlights!

5:30–6:30 PM

Evening Reception: Enjoy Great Conversation, Music, & Networking

- **Relax and unwind** with tasty cocktails after a long day of learning.
- Don't miss your chance to **win fun prizes** by scanning your badge at our exhibitor booths.
- Make dinner plans with your **new connections** and explore the best of what Toronto nightlife has to offer. Just be sure to set your alarm for Day 2!

6:30 PM

Conference Adjourns to Day 2

8:00–8:50 AM

Day Two Registration & Networking Breakfast: Build Community Contacts

- Start your day off right and connect with **financial marketing leaders**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices** and prepare for the day ahead.

8:50–9:00 AM

Day Two Opening Remarks From The chairperson

Gain insight into today’s sessions so you can get the most out of your conference experience.

9:00–9:30 AM

Keynote fireside Chat: One Vision, One Brand

Unifying and Launching with Momentum

- Starting with client research and insights to create a clear framework and approach.
- Building one MIM integrated operating model, go-to-market ecosystem, brand, and unified experience.
- Establishing a modern, human-centered brand grounded in client insight and translating it consistently across touchpoints.
- Designing a cohesive, scalable brand system and digital experience to market.
- Evolving teams, capabilities, and ways of working by embedding AI to drive speed and scale.
- Leveraging data, AI, and digitally enabled marketing to drive relevance, revenue generation, and long-term value.



Koley Corte

Chief Marketing Officer & Senior Vice President, Investment Management & Retirement Solutions
MetLife

9:00–9:30 AM

Industry Expert: Social, Search, & Reputation Convergence

How to Leverage Cross-Channel Synergy for Exponential Reach

- Transform content that ranks in AI-driven search results and fuels social sharing.
- Align paid search, organic SEO, and hyper-local campaigns to reinforce messaging and maximize ROI.
- Optimize cross-channel analytics to measure interaction effects and dynamically guide budget distribution.

10:00–10:45 AM

Panel Discussion: Strategic Response Management

How to Build Always-Ready Playbooks for Real-Time Market Shifts and Crises

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

10:45 -11:15 AM

Refreshments Break & Exhibitor Lounge: Visit Booths & Source Expertise

- Discuss ideas on how to **transform your organization** so it embraces innovation.
- **Share your challenges** in identifying transformative projects with peers.
- Schedule **one-to-one private meetings** for personalized advice.

11:15–12:00 PM

Roundtable Discussions (45 Mins)

ROUNDTABLE A: CRISIS, COMMS, & CONTROL: How to Protect Your Brand When Things Go Wrong

ROUNDTABLE B: WINNING ATTENTION IN A SATURATED MARKET: How to Cut Through Noise with Stronger Positioning and Storytelling

ROUNDTABLE C: BRAND IN THE AGE OF AI-GENERATED EVERYTHING: How to Maintain Authenticity When Content is Infinite



Martina Gago

SVP, Content Strategy
JP Morgan

ROUNDTABLE D: THE MODERN MARKETING TEAM: How to Structure Teams for Speed, Agility, and Performance

ROUNDTABLE E: PERSONALIZATION AT SCALE: How to Deliver Relevant Experiences Efficiently

ROUNDTABLE F: FROM STRATEGY TO EXECUTION: Why Marketing Plans Fail and How to Deliver Against Them

ROUNDTABLE G: BEYOND PRICE: How Insurance Marketers Defend Retention

ROUNDTABLE H: AI AS THE NEW INSURANCE AGENT: How Can Marketing Teams Optimize for AI Discoverability

ROUNDTABLE I: INVISIBLE INSURANCE: How to Amplify Brand Building in Embedded Experiences

12:00–12:30 PM

TRACK 1: RESILIENT BRAND

INDUSTRY EXPERT: BRAND BUILDING IN A DISTRUSTFUL ERA

How to Design a Financial Brand People Believe In

- Align brand purpose with customer expectations to create relevance and authenticity.
- Transform your brand without losing heritage or equity.
- Achieve consistency across channels, campaigns, and customer touchpoints for maximum impact.

TRACK 2: MODERN MARKETING CAPABILITIES

INDUSTRY EXPERT: PRECISION IN A BROAD MARKET

How First-Party Data Can Fuel Paid Media Breakthrough

- Achieve compliance and scale challenges unique to financial services marketing.
- Translate first-party data into actionable customer models.
- Increase lead quality and throughput while maintaining efficiency.

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

INDUSTRY EXPERT: BEYOND THE LEAD FUNNEL

How to Automate Campaign Planning, Budget Allocation, and ROI Optimization

- Adapt the “show, don’t tell” strategy used to secure executive and sales buy-in.
- Optimize the essential data and platform requirements needed.
- Achieve proven omni-channel tactics that deliver significant engagement lift and shift internal reporting.

12:30–1:00 PM

CASE STUDY: LEADING THE SHIFT

How to Use Modern Marketing in a Legacy Industry

- Increase and scale authentic client experiences in a digital-first world.
- Master balancing tradition with transformation to lead teams through rapid change.
- Strengthen future-proofing a marketing organization.
- Transform your brand strategy, navigate compliance with creativity, and learn to lead with more impact.

CASE STUDY: MAXIMIZING MARKETING IMPACT WITH LIMITED BUDGETS

How to Drive Results Through Smart Targeting, Personalization, and Analytics

- Adapt and allocate marketing budgets efficiently.
- Optimize data, analytics, and CRM tools to refine targeting and enhance personalization across channels.
- Achieve a media mix strategy that maximizes customer engagement and drives measurable outcomes.

CASE STUDY: MARKETING IN THE REGULATORY SPOTLIGHT

Learn What Financial Marketers Need to Know

- Bolster your marketing innovation with evolving expectations.
- Master the marketing practices that get the most regulatory attention.
- Navigate the use of personalization, data targeting, and AI within existing regulatory expectations.



Mary Koomson
Director of Digital Marketing,
EMEA APAC & US
RBC Global Asset Management

1:00–2:00 PM

Networking Lunch & Exhibitor Lounge Visits

- Meet interesting speakers and pick their brains on the **latest industry issues**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **financial marketing colleagues**.

2:00–2:30 PM

Industry Expert: Turning Brand Into A Measurable Growth Driver

How to Connect Brand Investment to Revenue, Retention, and ROI

- Enhance and link brand activity to revenue, retention, and customer lifetime value.
- Master a measurement framework that balances short- and long-term impact.
- Heighten opportunities to optimize spend without compromising brand equity.

2:30–3:15 PM

TRACK 1 CONTINUED: RESILIENT BRAND

PANEL DISCUSSION: THE FUTURE OF FINANCIAL BRAND BUILDING

How to Position Your Brand for Long-Term Resilience and Growth

- Bolster how evolving customer expectations will redefine trust, loyalty, and brand engagement.
- Align brand and customer experience to drive sustainable growth.
- Adapt your brand strategy to thrive in a digital -first, AI-enabled, and privacy-conscious landscape.

TRACK 2 CONTINUED: MODERN CAPABILITIES

PANEL DISCUSSION: BUILDING A HIGH PERFORMING MARTECH STACK

How to Cut Complexity and Drive Real ROI

- Perfect and connect fragmented systems to create a unified customer view.
- Excel and prioritize platforms and capabilities.
- Optimize, identify and eliminate unnecessary complexity to accelerate campaign execution and improve overall marketing efficiency.



Emily Stewart
Senior Vice President, Growth Strategies
MeriTrust

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

PANEL DISCUSSION: AUTOMATION WITHOUT ALIENATION

How to Balance AI With Human Touch to Ensure Trust in Insurance Marketing

- Bolster the key moments where human touch drives the greatest impact on trust and customer satisfaction.
- Transform client facing AI models that enhance the quality and speed of their experience.
- Achieve a unified customer experience that strengthens long-term loyalty and customer loyalty.

3:15–3:45 PM

Industry Expert: Centralized Customer Intelligence

How to Centralize Customer Data, Boost Conversions, and Drive Engagement

- Achieve a framework to solve operational inefficiencies.
- Bolster your strategies to automate advisor-driven campaigns.
- Amplify insights on increasing conversions and fidelity with time savings.

3:45–4:15 PM

Closing Fireside Keynote Presentation: The Currency Of Certainty

How to Design the Modern Financial Brand at Scale

- Amplify brand voice, tone, and compliance standards directly into your martech stack and content generation workflows, ensuring consistency and trustworthiness.
- Achieve clear strategies to connect your brand promise with hyper-personalized delivery models.
- Optimize processes and tools that reduce the average time-to-market for new campaigns from weeks to days, turning compliance overhead into a competitive advantage.

4:15-5:00 PM

Refreshments Break & Exhibitor Lounge: Attend Vendor Demos & Consult Industry Experts

- Enjoy **exclusive sponsor demos** and experience the next level of financial marketing innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

5:00-5:15 PM

Closing Comments From Your Host

Review the key solutions and takeaways from the conference. Source a summary of action points to implement in your work.

5:15 PM

Conference Concludes

Stay at the New York Hilton Midtown

A prime address in the heart of Manhattan

Centrally located in Midtown, the New York Hilton Midtown puts you within walking distance of Central Park, Times Square, Rockefeller Center, and Fifth Avenue. It's one of the most connected addresses in the city, making it a practical and comfortable base for two days of high-impact learning.

Built for conversation

Staying on-site means the summit's energy doesn't stop when the sessions do. With attendees and speakers all under the same roof, the conversations that start in the room carry on over dinner, at the bar, and in the lobby. It's the easiest networking you'll do all year.

Comfortable, self-contained stay

Rooms are spacious and modern, with free WiFi, flat-screen entertainment, and views of the Manhattan skyline. When you need to recharge, the hotel's 8,000-square-foot fitness center, indoor pool, hot tub, and Herb N' Kitchen restaurant are all on-site, along with a 24-hour business center and concierge desk.

Save travel time and money by staying on-site. A discounted group rate of \$409/night is available on a first-come, first-served basis until **September 25, 2026**.

[Book Your Room Now →](#)

Important: Strategy Institute is not affiliated with any third-party room booking service. Please contact the hotel directly to make your reservation.

***subject to availability



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Secure your spot at **DMFS Summit on October 28-29, 2026** in New York City.



What's Included With Your Full In-Person Pass

Full In-Person Access Includes:



Full conference access across all keynote, panel, workshop, and roundtable sessions



In-person networking with senior financial services marketing leaders, speakers, and sponsors



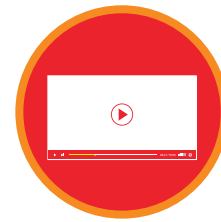
Breakfast, lunch, refreshments, and onsite evening networking reception



Access to the Expo Hall and solution showcase



Presentation materials and speaker resources (where available)



3 months of on-demand replay access after the event



Virtual Access Available

Can't attend in person? Live stream access is available for remote attendees and distributed teams.



Bring your team & save

Why Attend as a Team?

Sending a team allows you to divide sessions, bring back broader insights, and align departments on shared priorities.

DMFS New York features multiple tracks covering:



Resilient Brand



Modern Marketing Capabilities



Data & AI Enabled Go-To-Market



Insurance Marketing






Group Rates Available

Groups of 4+ qualify for discounted pricing \$995. Contact **Sam Caskey** for the best available rate for your organization.

Contact:

Sam Caskey, Delegate Registration Manager
Email: sam.caskey@strategyinstitute.com

Pass Type	Rate	Deadline
 Full In-Person Access	\$1,295	Ends June 26, 2026
 Team Rates (3)	from \$1,195 PP	Ends June 26, 2026
 Live Stream Access	\$995	Ends June 26, 2026