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

MetLife · US Mortgage Corporation · Long Arc Capital · Ardent Credit Union · JPMorganChase · kearnybank For today. For tomorrow. · Heritage Financial Credit Union · Meritrust Credit Union

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.

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.

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.

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.

05 Legacy Brand Evolution

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

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.

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.

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

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:

JPMorgan Chase & Co.
Fidelity Investments
Bank of America
Chubb
citigroup
State Farm
Vanguard
Lincoln Financial
Capital One
LPL Financial
Truist
Wealthfront
Morningstar
Janus Henderson Investors
Charles Schwab
HSBC
First Citizens Bank
Progressive
Regions
Robinhood
KeyBank
Huntington
BNY Mellon
American Express
Invesco
State Street
Suncoast Credit Union
Northern Trust Asset Management
Golden1 Credit Union
Brookfield
PENFED Credit Union
nuveen A TIAA Company
TIAA
ally
Allstate
Guardian
B|E|C|U
Neuberger Berman
Citadel
Edward Jones
Ameriprise Financial
PIMCO
Merrill A Bank of America Company
BlackRock
Aflac
TIGERGLOBAL
SoFi
M&T Bank
Voya Financial
Federated Hermes

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.

MONEX

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

SHELTERPOINT

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.

Northwestern Mutual

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

CAMBRIDGE ASSOCIATES

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

Mutual of America Financial Group
Retirement Services • Investments

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

Apple Bank

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

Atlantic Union Bank

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

FRANKLIN TEMPLETON INVESTMENTS

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

wellby FINANCIAL

Agenda at a Glance

Eastern Std. Time	DAY 1 - Wednesday, October 28, 2026
7:30 AM	**Registration & Networking Breakfast:** Build Community Contacts
8:30 AM	**Welcome From Strategy Institute**
8:35 AM	**Opening Remarks from The Chairperson**
8:45 AM	**Keynote Presentation:** Building Blocks For Branding
9:15 AM	**Keynote Panel Discussion:** Intelligent Content Engine
9:45 AM	**Speed Networking! Make Meaningful Connections**
10:05 AM	**Industry Expert:** Technology-Enabled Change Management
10:35 AM	**Refreshments Break & Exhibitor Lounge:** Visit Booths & Source Expertise
11:05 AM	**Tracks:** Case Study: Building Narratives That Resonate / Playing Offense in a Defensive Rate Market / Intent-Driven Forecasting
11:35 AM	**Industry Experts:** Seeing What You Can't / Referral Marketing / Re-Imagining Webinar Marketing
12:05 PM	**Panel Discussion:** From Brand Strategy to Revenue Strategy / Marketing to The Next Generation / SEO Vs Geo
12:35 PM	Networking Lunch & Exhibitor Lounge Visits
1:35 PM	**Panel Discussion:** Grassroots Marketing / Martech Consolidation / Automation Powerhouse
2:05 PM	**Industry Expert:** Harmonize Personalization, Trust & Compliance / Search + Strategy / Insights to Activation
2:35 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
3:10 PM	**Refreshments Break & Exhibitor Lounge**
3:40 PM	**Industry experts:** The future of Financial Messaging/ Precision in a Broad Market / Transforming Digital Execution in Financial Services
4:10 PM	**Panel Discussion:** Speaking The Boardroom Lingo
4:40 PM	End Of Day One Summary & Closing Remarks
5:00 PM	**Evening Reception:** Enjoy Great Conversation, Music, & Networking
6:00 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
8:30 AM	Day Two Opening Remarks From the Chairperson
8:40 AM	**Keynote fireside Chat:** One Vision, One Brand
9:00 AM	**Industry Expert:** Social, Search, & Reputation Convergence
9:30 AM	**Panel Discussion:** Strategic Response Management
10:10 AM	**Refreshments Break & Exhibitor Lounge:** Visit Booths & Source Expertise
10:40 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
11:25 AM	**Industry Experts:** Brand Building in a Distrustful Era / Improving ai Search visibility / Industry Expert: Beyond the Lead Funnel
11:55 AM	**Case Studies:** The Future of Financial Brand Building / Maximizing Marketing Impact With Limited Budgets / Multi-Generational Markting
12:25 PM	**Networking Lunch & Exhibitor Lounge Visits**
1:25 PM	Industry Expert: Turning Brand into a Measurable Growth Driver
1:55 PM	**Panel Discussions:** Leading the Shift / Building a High Preforming Martech Stack / Automation Without Alienation
2:30 PM	**Networking Lunch & Exhibitor Lounge Visits**
3:00 PM	**Industry Expert:** Centralized Customer Intelligence
3:30 PM	Closing Fireside Keynote Presentation: The Currency of Certainty
4:00 PM	Closing Comments From Your Host
4:05 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 — MetLife

Martina Gago
SVP, Content Strategy — citi

Jennifer Smith
Director, Channel Marketing — Fidelity Investments

Elizabeth Avery
Head of Enterprise Search — Wells Fargo

Dior George
VP, Integrated Marketing — TRUIST

Mark Gromek
Chief Marketing & Underwriting Officer — builders

Dawn Zappetti
Chief Marketing Officer — amalgamated bank

Lindsi Flynn
Chief Marketing Officer — US Mortgage Corporation

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

Alex Bogun
Managing Director, Head of Acquisitions — J.P.Morgan

Elizabeth Hiza
Chief Marketing Officer — BARNUM FINANCIAL GROUP

Stephen Zilch
Chief Marketing Officer — Capital Credit Union

Featured Speakers

View All Speakers →

Tamra A.B. O'Donnell

Senior Vice President, Director Corporate Marketing — Canandaigua National Bank

Eric Weisburg

Chief Marketing Officer — ART INSURANCE NOW.

Anand Solanki

CFO, Head of Strategy, Products and Analytics — CITADEL

Abbas Merchant

Executive Managing Director, Marketing | Data & AI — PROWESS

Catherine Heron Carroll

Global Head of Digital Marketing — PGIM

Kevin Daku

VP Digital Marketing and Analytics Director — GLOBAL X by Mirae Asset

Babu Ramalingam

EVP, Head of Marketing Analytics — REGIONS

Supriya Agarwal

Director- Marketing, Data & AI — SOSV

Umang Shah

Senior Leader - Engagement, Growth and Marketing Enablement — Vanguard

Jennifer Ballarin

Chief Marketing Officer — plante moran | Wealth Management

Donna Jermer

EVP Chief Marketing Officer — INSURITAS

Jessica Lyn Zall

Chief Marketing Officer — Burford

Featured Speakers

View All Speakers →

Adam Bell

Chief Marketing Officer, ARBOR

Jeanna M Venneri

Chief Marketing Officer, Elevance Health

Hong Bloom

Head of Marketing and Communications, Vanguard

Leatrice Caldwell

Senior Vice President, Outreach, secu

Tom Kuslikis

President & Chief Executive Officer, efcu FINANCIAL

Alletta Emeno

Chief Marketing Officer & Senior Vice President, ARDENT CREDIT UNION

Andrew Sommerfeld

Senior Vice President, Marketing Director, FIRST HOPE Bank

Jimesh Thaker

Executive Director, ThinkNirvana Foundation

Nikita Sharkov

Vice President, Digital Marketing & GTM Value Creation, LONG ARC CAPITAL

Vitthal Parker

Vice President, Marketing Strategy Lead, JPMorganChase

Matthew Lindenberg

Chief Marketing Officer & Senior Vice President, kearnybank For today. For tomorrow.

Steven Suthiana

Former Global Mar/Ad Tech Data, WESTERN UNION

Featured Speakers

View All Speakers →

Rena D'Andraia

Assistant Vice President, Marketing & Communications — HERITAGE Financial Credit Union

Susan Guess

Chief Marketing Officer & Senior Vice President — Paducah Bank WOW!

Olympia Moukas

Former VP, Head of Product Positioning — TIAA

Jonathan Hanson

SVP Of Marketing Strategy — VyStar Credit Union

Leeor Sillman

Managing Director, Marketing — EPOCH

Emily Stewart

Senior Vice President, Growth Strategies — Meritrust Credit Union

Anna Papadopuolos

Principal, Head of Growth Marketing — Edward Jones

Drew Hirsty

Director of Marketing — new penn FINANCIAL

Melissa Kanter

Head of Communications & Brand Experience, Americas — ING

Deep Kaushik

Marketing Technology and Retirement Solutions Lead — CAPITAL GROUP

Sarah Madden

Growth Marketing & Communications Lead — BOXX INSURANCE

Rahul Newab

President Data & AI — PROWESS

DAY 01 Wednesday
October 28, 2026

Detailed Agenda

7:30–8:30 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.

8:30–8:35 AM

Welcome From Strategy Institute

Rebecca Mayoh-Davis
Production Manager
Strategy Institute

8:35–8:45 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

8:45–9:15 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.

9:15–9:45 AM

Keynote Panel Discussion: Intelligent Content Engine

How to Use Data-Driven Creation and Distribution for Maximum Relevance

- 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
Citi

Kevin Daku
VP Digital Marketing and Analytics Director
Global X ETFs

Olympia Moukas
Former VP, Head of Product Positioning
TIAA

Anand Solanki
CFO, Head of Strategy, Products and Analytics
Citadel

9:45–10:05 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.

10:05–10:35 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.

10:35 -11:05 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.

11:05–11:35 PM

TRACK 1: RESILIENT BRAND

CASE STUDY: BUILDING NARRATIVES THAT RESONATE

Turning Moments into Movements

- Bolster brand relevance by anchoring campaigns to the cultural moments your customers already care about.
- Strengthen cross-functional buy-in by tying storytelling investments to the metrics leadership tracks.
- Amplify customer loyalty by evolving one-off campaigns into movements that outlast the moment.

Dior George
VP, Integrated Marketing
Truist

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.

11:35–12:05 PM

INDUSTRY EXPERT PRESENTATION: SEEING WHAT YOU CAN'T

How to Win the Next Generation of Wealth

- You have more data than any generation of marketers in history, but your tools face the wrong way. Relying on internal CRM data and traditional demographics creates blind spots that leave incumbent banks out of touch with the next generation of wealth.
- This session explores how to eliminate these blind spots using Outsight. We will look at external signals from audiences, competitors, and platforms to see what your internal data misses.
- **Audience Blind Spots:** Your CRM cannot tell the difference between a loyal customer and one already moving to a challenger bank. We will track the open-web behaviour of the mass affluent self-investor to show where their attention is actually going.
- **Content Blind Spots:** We will break down the volume-without-traction problem by looking at the exact performance gap between Big Five owned content and digital-native competitors.
- **Competitive Blind Spots:** We will quantify a 43-to-1 spending gap where incumbent paid media failed to match the organic engagement of challengers. Then we will look at how those challengers used specific creator partnerships to win.

Charlie Grinnell
Co-CEO
RightMetric

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.

12:05–12:35 PM

PANEL DISCUSSION: 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.

Melissa Kanter
Head of Communications & Brand Expereince
ING

Elizabeth Hiza
Chief Marketing Officer
Barnum Financial Group

Stephen Zilch
Chief Marketing Officer
Capital Credit Union

Tamra A.B. O'Donnell
Senior Vice President, Director Corporate Marketing
Canandaigua National Bank

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.

Babu Ramalingam
EVP, Head of Marketing Analytics
Regions Bank-

Dawn Zapetti
Chief Marketing Officer
Amalgamated Bank

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.

Vitthal Parker
Vice President, Marketing Strategy Lead
JPMorganChase

Sarah Madden
Growth Marketing & Communications Lead
Boxx Insurance

Catherine Heron Carroll
Global Head of Digital Marketing
PGIM

Eric Weisburg
Chief Marketing Officer
ArtNowInsurance.com

12:35–1:35 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**.

1:35–2:05 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

Andrew Sommerfeld
Senior Vice President,
Marketing Director
First Hope Bank

Leatrice Caldwell
Senior Vice President,
Outreach
SECU

Tom Kuslikis
President &
Chief Executive Officer
EFSU

TRACK 2 CONTINUED: MODERN CAPABILITIES

PANEL DISCUSSION: 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.

Deep Kaishik
Marketing Technology and
Retirement Solutions Lead
Capital Group

Supriya Agarwal
Director- Marketing, Data & AI
SOSV

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

PANEL DISCUSSION: 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.

Alex Bogun
Managing Director, Head of Acquisitions,
Media/Advertising, and Brand
Chase Sapphire, JP Morgan

2:05–2:35 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.

2:35–3:10 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.

Jennifer Ballarin
Chief Marketing Officer
Plante Moran Wealth Management

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.

3:10–3:40 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.

3:40–4:10 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: 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 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.

4:10–4:40 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
VP, Digital Marketing & GTM Value Creation
Long Arc Capital

Rena D'Andraia
Assistant VP, Marketing & Communications
Heritage Credit Union

Lindsi Flynn
Chief Marketing Officer
US Mortgage Corporation

Moderator

Jessica Lyn Zall
Chief Marketing Officer
Burford Capital

4:40–5:00 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!

5:00–6:00 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!

6:00 PM

Conference Adjourns to Day Two

DAY 02 Thursday
October 29, 2026

Detailed Agenda

8:00–8:30 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.

8:30–8:40 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.

8:40–9:00 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.

9:30–10:10 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.

Hong Bloom
Head of Marketing and Communications
Vanguard

10:10–10:40 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.

10:40–11:25 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
Citi

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

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

Donna Jermer
EVP Chief Marketing Officer
INSURITAS

11:25–11:55 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: IMPROVING AI SEARCH VISIBILIT

How to Increase Search Visibility for Banking and 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: 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.

11:55–12:25 PM

TRACK 1: RESILIENT BRAND

CASE STUDY: 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.

Anand Solanki
CFO, Head of Strategy,
Products and Analytics
Citadel

TRACK 2: MODERN MARKETING CAPABILITIES

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.

Jimesh Thaker
Executive Director
ThinkNirvana Foundation

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

CASE STUDY: MULTI-GENERATIONAL MARKTING:

- Develop a practical “Two-Lane Growth Model” that balances trust-building initiatives designed for established audiences with growth-focused strategies that resonate with younger generations
- Demonstrate how organizations can maintain a consistent brand while delivering more relevant experiences to different audience segments
- Examine how evolving communication behaviors, including shifts in social engagement and digital validation, are changing the way people evaluate organizations and opportunities.
- Implement a multi-generational marketing strategy that strengthens both client acquisition and recruiting outcomes by aligning messaging, digital experiences, and audience expectations.

Drew Hirsty
Director of Marketing
Penn Financial

12:25–1:25 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.**

1:25–1:55 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.

1:55–2:30 PM

TRACK 1 CONTINUED: RESILIENT BRAND

PANEL DISCUSSION: 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.

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

Elizabeth Avery
Head of Enterprise Search
WellsFargo

Tamra A.B. O'Donnell
Senior Vice President,
Director Corporate Marketing
Canandaigua National Bank

Umang Shah
Chief Marketing Officer
Vanguard

2:30–3:00 PM

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.**

3:00–3:30 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.

TRACK 2 CONTINUED: MODERNCAPABILITIES

PANEL DISCUSSION: BUILDING A HIGH PREFORMING 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 Credit Union

Steven Suthiana
Former Global Mar/Ad Tech Data, Partnerships and Commerce Innovation Lead
Western Union

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.

Donna Jermer
EVP Chief Marketing Officer
INSURITAS

3:30-4:00 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.

Jeanna M Venneri
Chief Marketing Officer
Elevance Health

4:00-4:05 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.

4:05 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

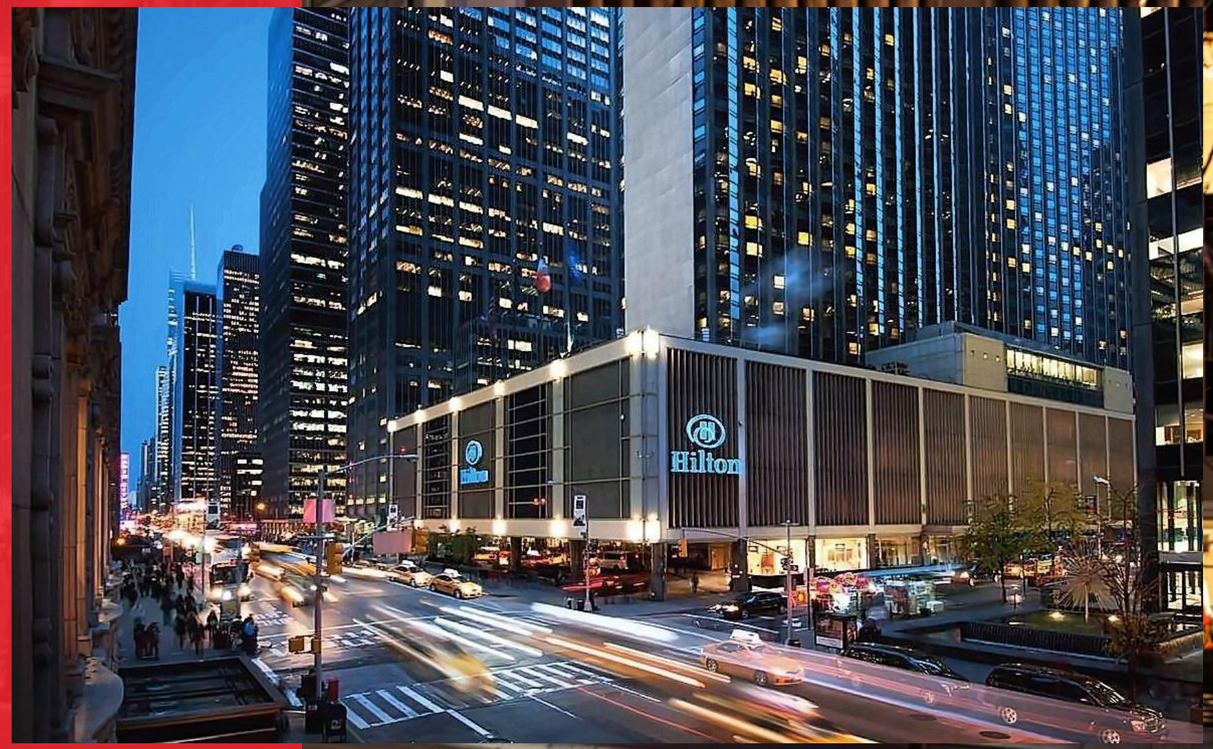
Rooms are spacious and modern, with free WiFi, flat-screen entertainment, and views of the Manhattan skyline. When you need to recharge, the hotel's 8,000-square-foot fitness center, indoor pool, hot tub, and Herb N' Kitchen restaurant are all on-site, along with a 24-hour business center and concierge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



Register for DMFS New York 2026

RSVP NOW →

New York's Top Financial Services Marketing Leaders Reveal What's Actually Working

- **Unify Your Brand at Scale:** Discover the inside story of how MetLife Investment Management unified two distinct brands into one integrated global brand, and how to translate that momentum to your own organization.
- **Speak the Boardroom's Language:** Learn how to turn marketing ROI into terms your CEO, CFO, and COO actually buy, from leaders at Long Arc Capital, Heritage Financial Credit Union, and US Mortgage Corporation.
- **Turn Product Design Into a Growth Lever:** See how Ardent Credit Union tied a CD offering to a local sports partnership to drive real engagement, and how to replicate that playbook at your institution.
- **Automate Without Losing the Human Touch:** Explore where AI strengthens the client experience in insurance marketing, and where human judgment still has to lead.
- **Win the AI Search Era:** Unpack how SEO and GEO work together so your brand stays visible and trusted across both traditional and AI-driven search.
- **Turn Compliance Into a Competitive Edge:** A dedicated Insurance Marketing track tackles how to drive marketing innovation without compromising regulatory standards.
- **Close With the Blueprint for Scale:** Get the closing keynote playbook for operationalizing brand standards across your martech stack to grow trust and revenue at scale.
- **Join the Room That Matters:** Senior marketing leaders from banks, credit unions, insurers, and wealth management firms across the US come together October 28-29, New York Hilton Midtown.