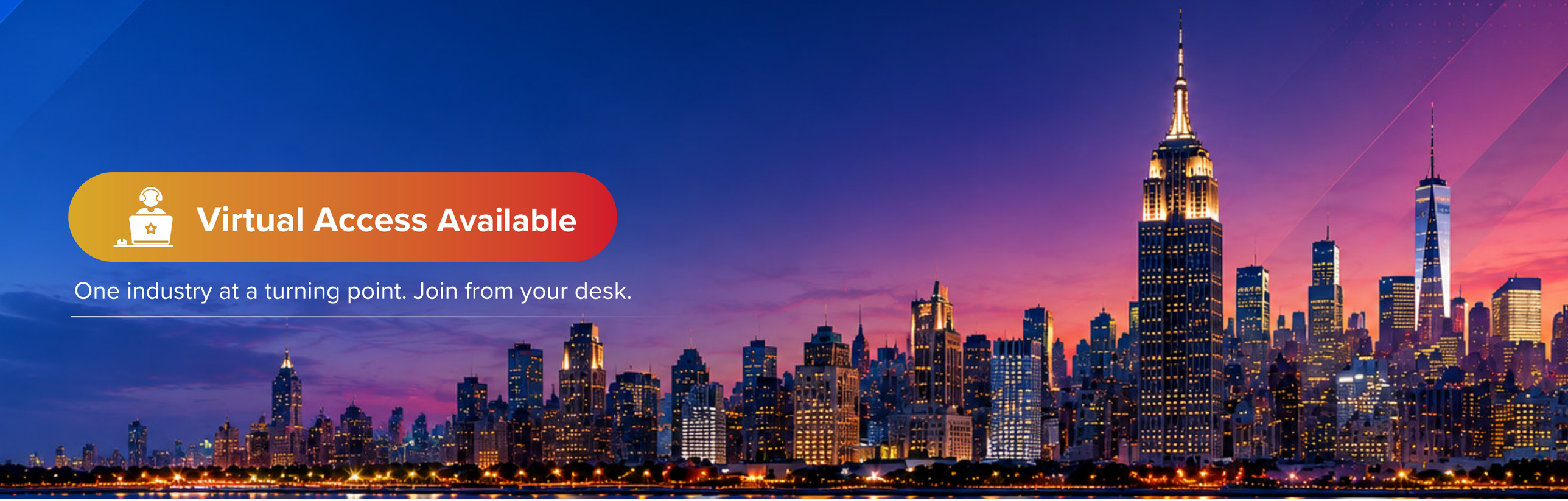
Attend From Anywhere

Digital Marketing *for* Financial Services Summit 2026

October 28 & 29, 2026
New York Hilton Midtown



Virtual Access Available

One industry at a turning point. Join from your desk.

US Mortgage Corporation · Long Arc Capital · Ardent Credit Union · RBC Global Asset Management · MetLife · Goldman Sachs · Heritage Credit Union · Apple Bank

Why Attend in 2026?

The Rules of Financial Marketing Are Being Rewritten

Customer expectations have shifted, AI has moved from conversation topic to operational reality, and the pressure to prove marketing's value to leadership has never been higher. Financial marketers across banking, insurance, wealth management, and credit unions are navigating all of this at once — under tighter budgets, with leaner teams, and less room to get it wrong.

DMFS Chicago and DMFS New York are built specifically for this moment. Both programs were developed directly from research with senior marketing leaders across the US financial services industry, covering what they are actually dealing with right now. More than 35 confirmed speakers from institutions including MetLife, JPMorganChase, Fifth Third Bank, Ardent Credit Union, Insurely, and RBC Global Asset Management. Both events are now available virtually — full access to the sessions that matter most to your role, without the cost and logistics of travel.

Why attend virtually?

- A dedicated virtual host on site who monitors your chat, runs Q&A and polls, and keeps you connected to the room throughout both days
- Structured virtual networking, Teams or Zoom links during every break, breakfast, and lunch so you can connect with the full virtual audience while in-person attendees are off the floor
- Exclusive sponsor breakout sessions in Brella, eight sponsors across two days lead targeted 10–15 minute sessions for the virtual audience only
- A care package delivered before the event, snacks, a make-your-own cocktail or mocktail kit, and a personalized note to set you up for two days of content

Day 01 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 Presentation:** Technology-Enabled Change Management
10:35 AM	**Refreshments Break & Exhibitor Lounge:** Attend Vendor Demos & Consult Industry Experts
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/ Improving Ai Search visibility / 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

Day 02 Wednesday, 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
9:10 AM	**Industry Expert:** Social, Search, & Reputation Convergence
9:40 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 PM	**Industry Experts:** Brand Building in a Distrustful Era / Precision in a Broad Market/ **Industry Expert:** Beyond the Lead Funnel
11:55 PM	**Case Studies:** The Future of Financial Brand Building / Maximizing Marketing Impact With Limited Budgets / From Risk to Relevance
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
4:00 PM	Conference Concludes

Trusted by Leading Companies in Banking, Insurance, Credit Unions, Capital and Wealth Management

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

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

First PREMIER Bank PREMIER Bankcard

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

Atlantic Union Bank

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

wellby FINANCIAL

Amazing programming, strong sessions, well-run.

american first finance

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

FRANKLIN TEMPLETON INVESTMENTS

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!

SONDHELM PARTNERS
Growth Solutions for Asset Managers

Who Attends?

33across · Ameritas · Apple Bank · ASPIDA · Boston University · BOXX Insurance

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Flagstar Bank · Goldman Sachs · Greenthreads · insurely · iQUANTI · J.P.Morgan

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RBC Global Asset Management · ScholarshipOwl · securian financial · signalfinancial Federal Credit Union · SOCi · STARR Insurance

Northwestern Mutual · thrivent · TIAA · Tradesk · WEALTHSPIRE

How to Register?

VIRTUAL PASS

TWO-DAY LIVE STREAM ACCESS:
Tune into keynote sessions, panel discussions and case studies with real-time Q&A from the comfort of your home

VIRTUAL NETWORKING:
Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool

VIRTUAL EXPO HALL:
Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

SPEAKER PRESENTATIONS:
Take home PowerPoints and white papers addressing your biggest challenges

ON-DEMAND ACCESS:
Conveniently rewatch any session for up to 3 months after the event

Package	Final Price
1-2 Attendees	$1,595
3+ Attendees	$1,295

REGISTER NOW →

REGISTER FOR DELEGATE PASS

Contact:
Sam Caskey
Delegates Sales
Email: sam.caskey@strategyinstitute.com

GROUP RATES

Enhance your team collaboration, ROI, and industry presence with our existing group discounts for groups of 3+.
Speak with **Sam** about our best rates:

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