Digital Marketing *for* Financial Services

Portfolio of Events 2026-2027

GROW YOUR FINANCIAL SERVICES MARKET SHARE

JOIN FORCES WITH NORTH AMERICA'S **FINANCIAL MARKETING EVENT LEADER**

UPCOMING EVENTS

1. 13th Annual Digital Marketing for Financial Services Summit NEW YORK — OCTOBER **28-29, 2026** NEW YORK
2. 17th Annual Digital Marketing for Financial Services Summit CANADA — JUNE **1-2, 2027** TORONTO
3. 9th Annual Digital Marketing for Financial Services Summit MIDWEST — SEPTEMBER **2027** CHICAGO

- The **largest** and **longest-serving portfolio** of digital marketing for financial services events in North America for more than **16 years**
- **3 annual conferences** that solidify our reputation as a leader in the financial marketing space
- **15,000+ decision-makers** in our DMFS community of **senior-level buyers**
- Events attended by **CMOs, VPs** and **Directors** from top financial organizations that are looking to elevate their digital marketing
- Hybrid event platform gives you access to **the biggest names in financial marketing globally**
- **Immersive conference format** showcases your brand in an environment with in-depth engagement

HOW WE DELIVER **ATTENDEES**

- The premier financial marketing event series with a **strong grasp on the market** and a deep understanding of its needs
- **World-class speakers** and **leading-edge content** attract new buyers to the summit and encourage past delegates to return
- Results-driven delegate sales team **dedicated to securing your top prospects**, target companies and verticals
- **Vetted attendees** to prioritize seniority and relevance while capping sponsors to ensure the event remains unsaturated
- Active in the digital marketing for financial services field **year-round** with our finger on the pulse of **new trends** and the sector's biggest players
- Multichannel **targeted marketing campaign** to our DMFS community, including social media, paid digital, thought leadership content, personalized emails, an event website and brochure

TOP REASONS OUR **DELEGATES ATTEND**

- Source new technology partners
- Gain best practices and industry benchmarking
- Experience product demos
- Engage with peers face to face and virtually
- Connect with current solution providers
- Test drive new technology
- Meet thought leaders and visionaries
- Network with industry stakeholders
- Stay on top of market trends and innovations

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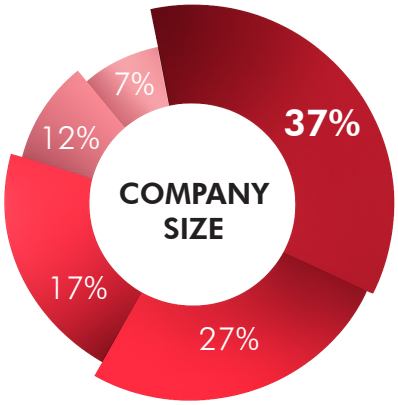
13th Annual

Digital Marketing *for* Financial Services Summit NEW YORK

OCTOBER
28–29,2026
NEW YORK

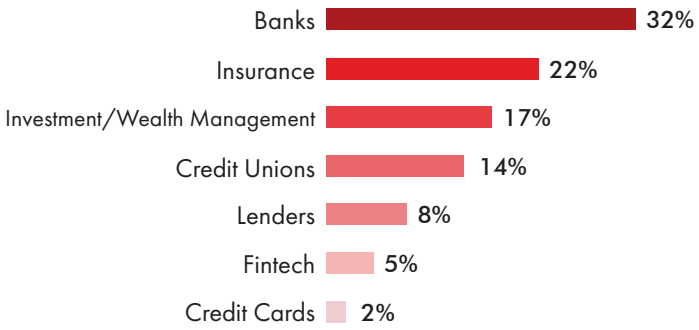
The largest and longest-running digital marketing for financial services event series in the United States

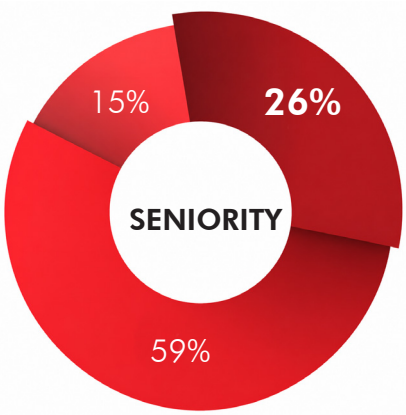
This innovative conference attracts **financial services executives** actively looking to invest in solutions to enhance their marketing and branding campaigns.



- **37% 5,000+ employees**
- 27% 1,001 – 5,000 employees
- 17% 201 – 1,000 employees
- 12% 50 – 200 employees
- 7% Under 50 employees

MARKET SEGMENTS





- **26% C-Suite/VP**
- 59% Director/Manager
- 15% Marketing Specialist

KEY METRICS

Director+ qualified leads

76% of attending companies generate $100M+ in revenue

64% of attending companies have 1,000+ employees

PAST SPEAKERS

Amy Hu
SVP & CMO
New York Life Insurance Company

Jennifer Ball
CMO
Franklin Templeton

Jacob Holtgrewe
Global Head of Marketing, Paid Media & Demand Generation
TIAA

Lynn Teo
CMO
Northwestern Mutual

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

Martiña Gago
SVP, Head of Content Strategy, Personal Banking & Wealth Management
Citi

Henry Detering
CMO
Neuberger Berman

Daniel Darst
Deputy CMO
Flagstar Bank

PAST ATTENDEES

Apple Bank, BlackRock, Franklin Templeton, Sunwest Bank, Northwestern Mutual, J.P.Morgan, Prudential, National Debt Relief, Fidelity Investments, axos Bank, LPL Financial, Janus Henderson Investors, State Street, North Avenue Capital, T.RowePrice, Leverage, Insuritas, HartfordFunds, First Command, Columbia Threadneedle Investments, unum, Direxion, Mutual of Enumclaw Insurance, Mutual of America Financial Group, Maspeth Federal Savings, Sun Life, Harding Loevner, Bloomberg, Boston University, Bank of America, Hines, Clear Street, Associated Credit Union, canada life, CHASE, Veterans United Home Loans, Dimensional, Hamilton Lane, ShelterPoint

PAST SPONSORS

Adobe, experian, Seismic, SITECORE, eClerx, Epsilon, moengage, DEMANDBASE, storyful, sas, kaltura, Amplitude, Outlier, maru/, GLASSBOX, Broadridge, Nielsen, KEYLER, chartis, allego

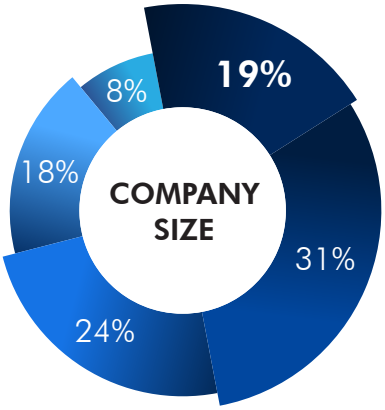
17th Annual

Digital Marketing *for* Financial Services Summit CANADA

JUNE
1–2, 2027
TORONTO

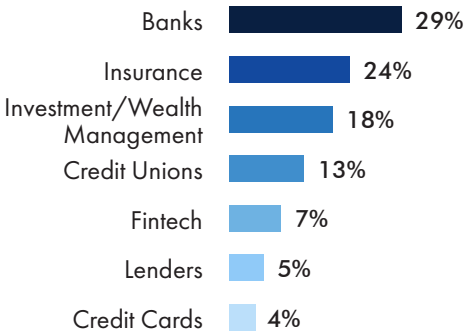
Canada's largest and longest-running digital marketing for financial services event series

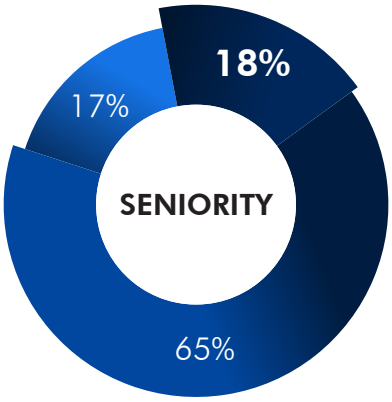
This flagship Canadian conference attracts **financial marketers** actively looking to invest in solutions to transform their digital engagement.



- **19% 5,000+ employees**
- 31% 1,001 – 5,000 employees
- 24% 201 – 1,000 employees
- 18% 50 – 200 employees
- 8% Under 50 employees

MARKET SEGMENTS





- **18% C-Suite/VP**
- 65% Director/Manager
- 17% Marketing Specialist

KEY METRICS

Director+ qualified leads

68% of attending companies generate $100M+ in revenue

50% of attending companies have 1,000+ employees

PAST SPEAKERS

Betsey Chung
SVP & Global Chief Marketing Officer
TD Bank

Alan Depencier
CMO, Personal, Commercial Banking & Insurance
RBC

Chris Hewitt
Global Head of Brand, Digital Marketing & Marketing Technology
Sun Life Financial

Renu Sihra Sehmi
Head of Enterprise Digital Marketing Operations
Scotiabank

Katy Dugal Simpson
CMO – The Callaway Black Group
Northwestern Mutual

Margaret Adaniel
VP, Digital, Marketing & Communications
CIBC

Siddharth Vishwanathan
Head of Digital Acquisition
BMO Financial Group

Leanne Nullmeyer
AVP, Marketing & Brand Experience
IG Wealth Management

PAST ATTENDEES

TD Bank, AGF, Scotiabank, Wealthsimple, BMO, canada life, National Bank of Canada, CI Financial, Great-West Lifeco Inc., Fairfax Financial Holdings Limited, Sun Life, HSBC, Sun Life Global Investments, Fidelity International, Power Financial Corporation, Brookfield, Vanguard, citigroup, AVIVA, neo, Equitable Bank, simplii financial, Laurentian Bank, motusbank, Tangerine, Raymond James, Desjardins, Nicola Wealth, Questrade, STACK, KOHO, Nest Wealth, Julius Bär, Edward Jones, Capital Group, Fiera Capital, intact, Allstate, CAA, Home Bank, VersaBank, FNBC, Bank, B2B Bank, IGM Financial

PAST SPONSORS

SAS, Adobe, Deloitte., maru/, sprinklr, Optimizely, DEMANDBASE, SITECORE, ENVIRONICS ANALYTICS, messagepoint, Hootsuite, iQUANTI, MARIGOLD, Pinterest, search engine people, SOCi, YEXT, VERSACOM

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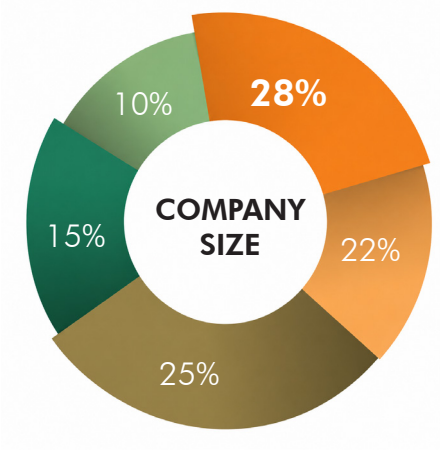
9th Annual

Digital Marketing *for* Financial Services Summit MIDWEST

SEPTEMBER
2027
CHICAGO

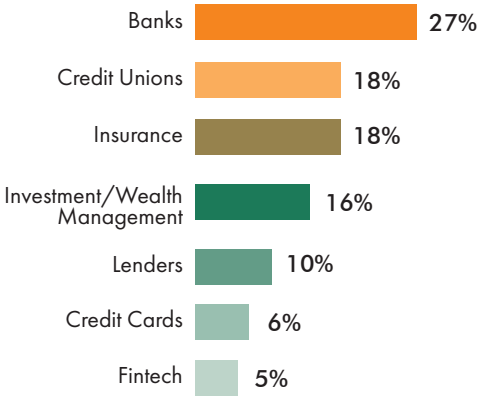
The premier digital marketing event series for financial leaders in the Midwest

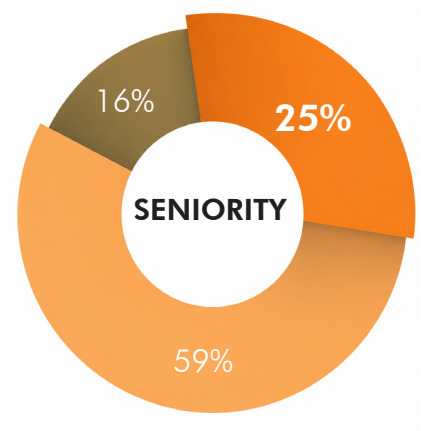
This exclusive conference connects top solution providers with **financial marketing innovators** in the Midwest.



- **28% 5,000+ employees**
- 22% 1,001 – 5,000 employees
- 25% 201 – 1,000 employees
- 15% 50 – 200 employees
- 10% Under 50 employees

MARKET SEGMENTS





- **25% C-Suite/VP**
- 59% Director/Manager
- 16% Marketing Specialist

KEY METRICS

Director+ qualified leads

66% of attending companies generate $100M+ in revenue

50% of attending companies have 1,000+ employees

PAST SPEAKERS

David Partain
SVP & Global CMO, FlexShares ETFs
Northern Trust Asset Management

Vijay Konduru
EVP & CMO
Huntington National Bank

Brent F. Korte
SVP & CMO
Ameritas

Aggie Tuxhorn
CMO & SVP
Skyward Credit Union

Monu Kalsi
VP, Marketing
CNO Financial Group

Sumeet Grover
Chief Digital & Marketing Officer
Alliant Credit Union

Alejandra Denda
CMO
The Federal Savings Bank

James Stadler
CMO
Old National Bank

PAST ATTENDEES

usbank, PNC, BMO, Wintrust, MidWest America Federal Credit Union, KeyBank, Huntington, Comerica, Rate, LMCU, First Horizon National Corporation, Grinnell Mutual, Associated Bank, Quicken Loans, GEICO, Edward Jones, Heartland Financial USA, Inc., Regions, Wings Credit Union, William Blair, Consumers Credit Union, Flagstar Bank, Diamond Hill, Affinity Plus Federal Credit Union, Erie Insurance, Auto-Owners Insurance, nuveen, fnbo, WesBanco, Carson, State Farm, Baxter, First Merchants Bank, West Bend, Great Western Bank, Guide Mortgage, OneMain Financial, Gate City Bank, American Family Insurance, Community America Credit Union, summit Credit Union, First Southern Bank, Baird, Hightower, Focus Financial Partners, fox valley credit union, Stifel

PAST SPONSORS

Tealium, moengage, Seismic, Hootsuite, Snapchat, ResultiCks, Atmosphere, Phase 5, Pantheon, yext, peppercontent, kaltura, Goldcast, Extole, Instapage, Xcentium

SPONSOR TESTIMONIALS

"There is no other event that brings industry leaders in the same room with high intent. DMFS has done a great job of getting highly relevant companies and their highly engaged decision-makers through the door … This is our third DMFS and has probably been our best to date. Every event seems to get better than the one that proceeds it. Certainly feels like feedback is being heard and acted upon! The attendance and engagement was high, and delegates were interested in learning more about us … In-person networking was great, everyone was approachable and able to have deeper conversations. Great event for branding and meeting the right people … Communication leading up to the event was also great. I had all the information I needed and ready to go coming to the start of the conference.

iQUANTI

"We've participated both in Canada and the U.S. and will continue to do so … Everyone here is someone who is very highly engaged in marketing, very highly engaged in digital, and they're all interested in getting to that next stage.

Hootsuite

"Great event for any organization looking to raise their profile and reach a target audience in the financial service sector! Well organized conference. Good networking opportunities. Clear communication and organization. Interesting content … It was amazing working with the entire DMFS event staff.

PHASE 5

"DMFS is the place to be for all professionals working in, near, or far from the industry of financial services. Our experience was full of insightful conversations, good meetings and very high-quality leads.

TRSB
Translating Challenges Into Solutions

"Great event. High-quality attendees and conversations with the right personas. Pleased with the engagement and we plan to come again.

MARIGOLD

"First time we attended. Very refreshing. Great experience. Lots of new connections … Very good sessions. We learnt so much! … The communication leading up to the event was spot on.

SITEPLUG

"I think the quality of people is fantastic. I had a lot of great conversations and a lot of great leads for us to be calling on.

Broadridge

"Amazing and fun event to attend! Lots of great thought leaders from the industry to share and gather insights. There was also a lot of support from the Strategy Institute team.

Dialog Insight

YOUR SPONSORSHIP **PACKAGES**

GOLD

- One of our most prestigious sponsorship opportunities with **a premium slot on the agenda** and **maximum exposure**.
- It features a **30-minute speaking session** as well as a fully branded exhibit booth.
- The package also includes:
  - A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - Access to the complete delegate and speaker list
  - 3 all-access VIP passes for your team
  - 10 additional complimentary passes to invite your clients and prospects

SILVER

- The silver package provides the perfect opportunity to **demonstrate your brand's expertise on key themes important to the community**.
- It includes a speaking or moderating spot on a **30-minute panel** as well as a fully branded exhibit booth.
- The package also includes:
  - A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - Access to the complete delegate and speaker list
  - 3 all-access VIP passes for your team
  - 10 additional complimentary passes to invite your clients and prospects

YOUR SPONSORSHIP PACKAGES

BRONZE

- Are your main sponsorship goals brand awareness and networking? The bronze package allows you to **display your products onsite and network with prospects face to face**.
- You are provided with a **prime booth location** to demo your products and access to all networking sessions onsite.
- The package also includes:
  - A fully customizable exhibit booth
  - A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - Access to the complete delegate and speaker list
  - 2 all-access VIP passes for your team
  - 10 additional complimentary passes to invite your clients and prospects

NETWORKING

- As an entry-level sponsorship opportunity, **get a feel for the seniority and relevance of our DMFS audience** with the chance to attend the event and leverage onsite branding.
- The package also includes:
  - 2 all-access VIP passes for your team
  - Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials as well as promotion through a co-marketing campaign

ADDITIONAL OPPORTUNITIES

TAILORED TO YOUR BUSINESS NEEDS

What better way to connect with potential prospects than through a host of engaging onsite activities or premier branding opportunities.

- Roundtables
- Exclusive Evening Reception
- Conference Host
- Breakfast Briefing
- VIP Hosted Dinner
- Exclusive Lanyards
- Lunch & Learn
- Wifi

SECURE YOUR SPOT NOW

Book a call to learn how this opportunity can help you generate new leads and increase your pipeline!

Darren Haughian
Sponsorship Director
darren@strategyinstitute.com
Call: **1-866-298-9343 x 276**

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