

8th Annual

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

November 16 - 17, 2021

Network with
the biggest
names in
digital marketing.
Register today!

Gain actionable insights from innovative marketing leaders
representing North America's largest financial brands.

Meet + Network + Learn From:



Jay Jaffin
Chief Marketing &
Digital Officer
Western Union



Bolun Li
Founder & CEO
Zogo



Shadaab Kanwal
Managing Director
Digital, Data, and
Analytics
Charles Schwab



Nicole German
Global Vice President,
Head, Enterprise Digital
Marketing
Scotiabank



Connie K. Weaver
Chief Marketing Officer
Equitable



Alex Sion
Director & D10X
Co-Head, Global
Consumer Bank
Citi Ventures



Benefits/Themes:

- ✓ Automated solutions
- ✓ New social media tools
- ✓ Voice commerce and SEO
- ✓ Fresh, relevant content
- ✓ Blended data analytics
- ✓ Personalized engagement
- ✓ C-suite investment

Gold Sponsors:

vidmob

Optimizely

DEMANDBASE

ACQUIRE

h hearsay

maru

SITECORE

outlier

sas

FinancialDigitalMarketingUS.com

8th Annual

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

Transform your digital marketing strategy to boost customer performance and profits!

Welcome to the 8th Annual Digital Marketing for Financial Services New York Summit — one of the **longest running** and **most established** digital marketing events in North America. DMFS NY attracts leaders from across the financial services industry to help you increase revenue, build trust and differentiate your brand. They are eager to share their most effective strategies, how they pivoted during COVID and what's next on the digital horizon.

This summit champions digital growth in a complex post-COVID world. It has been carefully designed to provide you with:

- The **latest tools** and **tactics** you need to plan a better customer engagement experience and digital adoption
- **Practical case studies** to help solve the most challenging issues in financial services digital marketing today
- Access to the **top digital disruptors** who are proud owners of change and passionate about sharing their expertise
- Exciting networking opportunities with **500+** like-minded industry peers

Secure your spot today to ensure you remain ahead of your competitors and a leader within your market.

We look forward to seeing you at this important event!

Hear from top financial organizations, including: **U.S. Bank, Charles Schwab, Western Union, Navy Federal Credit Union, PayPal, Wells Fargo, Prudential Financial, Pacific Blue, RBC** and many more!

Your DMFS Team Strategy Institute

GET CRITICAL INSIGHTS FROM



NEW THIS YEAR

- 1. Keynote: The New Digital Marketing Economy**
Transform Your Sales and Marketing Teams to Anticipate Demand for All Things Digital
- 2. CMO Power Panel: Innovations in a Post-Pandemic Society**
Transform Customer Relationships with Stand-Out Product Innovation and Sharper Digital Marketing
- 3. Fireside Chat: Resetting Your Digital Journey**
Lessons in Challenge and Transformation to Build a New Presence
- 4. Keynote: Better Content Creation Strategies**
Blogs, Pain Points and Increased Volumes: Building More Relevant & Dynamic Content
- 5. Keynote Panel: Building a Robust Content Marketing Strategy**
Keeping Pace with Powerful Changes in Digital by Harnessing Better Content Marketing

EVENT IN NUMBERS

40+ TOP INDUSTRY
SPEAKERS

500+ DIGITAL MARKETING
DECISION-MAKERS

10+ HOURS OF
NETWORKING

Register Today by Calling 1 866 298 9343 x 200

CONTENT BASED ON SOLUTIONS

1. Transform Your Sales and Marketing Teams to Anticipate Demand for All Things Digital
2. Blogs, Pain Points and Increased Volume: How to Build More Relevant & Dynamic Content
3. Keeping Pace with Powerful Changes in Digital by Harnessing Better Content Marketing
4. Enabling A More Customer-Centric Product Development & Communication Approach
5. Transform Customer Relationships with Stand-Out Product Innovation and Sharper Digital Marketing
6. Boost Lead Generation, Nurture and Retain Customers in Times of Uncertainty
7. Bring Your Customers into Sharp Focus with Data Analytics
8. The Pandemic Explained Through Data & Analytics: Lessons for Marketers Making Sense of a New World
9. Ready, Set, Digital: Accelerating Engagement for FSI Organizations
10. Tried and Tested Email Marketing Tactics for Banks, Credit Unions, Insurers and Fintechs

THE MOST ANTICIPATED AGENDA SESSIONS

Strategies, Best Practices and Ideas to Move Your Digital Marketing Program Forward!

- 1. Power Panel: Pivoting to Mobile Micro-Moments**
Why and How Marketers Should Leverage Micro-Moments Marketing
- 2. Fireside Chat: High-Performing Social Media**
Harness Social Media Strategies to Build Increased Website Traffic, Leads and Sales
- 3. Specialist Innovators Panel: SEO Vs. Pay-Per-Click**
Engagement Tips, Tricks and Quick Breakthroughs: Which Method to Use When, Where and to Maximize Profits
- 4. Case Study: Influencers ... Converting Likes to Proper Sales**
How Influencer Marketing is Evolving into Performance Marketing
- 5. Power Panel: Financial Services Design and UX 4.0**
Transform Simplification Models into Instruments to Accelerate Digitalization

REGISTER TODAY!

Don't miss this opportunity to stay on top of critical developments in digital marketing innovation. Take away digital marketing strategies unique to the financial industry that will have a lasting impact on the success of your business!

Save your spot now, and get access to North America's top resource for innovative, transformative and practical information on digital marketing for financial services.



1-866-298-9343 x 200



registrations@strategyinstitute.com



FinancialDigitalMarketingUs.com

START THE CONVERSATION BEFORE THE SUMMIT



Join the LinkedIn Group 'Digital Marketing for Financial Services Community!'



Follow and tweet @DMFinancialServ to connect with leaders attending #DMFSNY

PAST ATTENDEES INCLUDE

CI Financial, Piedmont Advantage Credit Union, Meridian Credit Union, MFA Asset Management, Guardian Life Insurance, HSBC, Seacoast Bank, TD Bank, PIMCO, Matthews Asia, Beacon Federal Credit Union, Prudential Financial, Comerica Bank, Apple Bank, RBC, Bank of America Corporation, Wells Fargo, BMO Harris Bank, M&T Bank, Banco Santander, Investors Group, Firefighters First Credit Union, Discover Financial Services, Fidelity Investments, GP Capital Management, Axemen Resource Capital Ltd., RateCity, CipherTrace, VoPay International, GreenPath Financial Wellness, Advance Capital Management, BNY Mellon, Scotiabank, Equifax, Liberty Mutual, Sun Life Financial

Register Online at FinancialDigitalMarketingUS.com

SPEAKERS



Shadaab Kanwal

*Managing Director
Digital, Data, and
Analytics*

Charles Schwab



Jay Jaffin

*Chief Marketing &
Digital Officer*

Western Union



Deidre Davis

Chief Marketing Officer

**MSU Federal Credit
Union**



Yogesh Mehra

Vice President Marketing

First Republic Bank



**Connie K.
Weaver**

Chief Marketing Officer

Equitable



Daniel Kennedy

*Vice President of
Distribution Excellence*

Scotiabank Chile



Pam Piligian

*Senior Vice President,
Marketing*

**Navy Federal Credit
Union**



Bolun Li

Founder & CEO

Zogo



**Aviad
Pinkovezky**

Chief Product Officer

Hippo Insurance



Jim Albert

*Chairman and
Co-Founder*

**Neptune Flood
Insurance**



Rachel Mann

Head of Digital Engagement

American Fidelity



Jeff Fenigstein

Vice President Marketing

Woodruff Sawyer

SPEAKERS



Michelle Volpe-Kohler

Senior Leader of
People, Culture &
Communications

**Federal Reserve
Bank of Cleveland**



Sanja Cancar-Todorovic

Enterprise Procurement
and Vendor
Management

**Home Trust
Company**



Jeannie Walden

Chief Innovation and
Marketing Officer

Dailypay



Sofie Zambas

Social Media Marketing
Strategist

PayPal



Heidi Worthington

Senior VP & Chief
Revenue Officer

Pacific Blue Cross



Nicole German

Global Vice President,
Head, Enterprise Digital
Marketing

Scotiabank



Alex Sion

Director & D10X
Co-Head, Global
Consumer Bank

Citi Ventures



Lori Pon

Director, Claim
Transformation and
Claim Service Center

**AAA-The Auto Club
Group**

Connect with Canada's top customer success leaders!

Find answers to your biggest challenges!

EVENT SPONSORSHIP & EXHIBIT OPPORTUNITIES

Make sure your company isn't left out of the conversation! Showcase your technology and expertise to key decision-makers focused on transforming their digital marketing strategies.

TOP 5 REASONS TO SPONSOR

1. Fill your marketing funnel with 500+ senior delegates sourcing digital marketing technology
2. Drive demand generation and demonstrate your thought leadership
3. Meet with your target accounts through exclusive networking opportunities
4. Showcase your solution in front of the right people at the right time
5. Maximize brand visibility to build loyalty and retention

DON'T MISS THIS OPPORTUNITY!



Darren Haughian

 1 866 298 9343 x 276

 Darren@strategyinstitute.com

**Limited sponsorship packages are available.*

 Register Today by Calling 1 866 298 9343 x 200

Pricing & Registration

Register Now

3 EASY WAYS TO REGISTER



Call
1-866-298-9343 ext. 200



Email
registrations@strategyinstitute.com



Register Online
financialdigitalmarketingus.com

Virtual Access Ticket

- ✓ Full access to the virtual conference, including all live keynotes, interactive sessions, and panel discussions
- ✓ Limited access to message boards, networking tables, private messages, and other networking features

\$295

Buy Now

Total 2021 Virtual Access Ticket

MOST POPULAR

- ✓ Complete access to the virtual conference, including all live and on-demand keynotes, interactive sessions, and panel discussions
- ✓ Full access to message boards, interactive polls, and contests
- ✓ Full on-demand access to all 2021 DMFS Content
- ✓ 25% off any 2022 DMFS event

\$495

Buy Now

DMFS 2021 Yearly Subscription

BEST VALUE

- ✓ Everything included in the Total Virtual Access Ticket plus:
- ✓ Full on-demand access to the DMFS West 2021 content library
- ✓ Full on-demand access to the DMFS Canada 2021 content library
- ✓ 25% off any 2022 DMFS event
- ✓ \$20 Starbucks Coffee gift card

\$795

Buy Now

Registration fee: The registration fee includes luncheon, receptions, refreshments, networking breaks, continental breakfast, and original course materials. Payment is required in advance and can be made by company check, VISA, MasterCard, or American Express. Please make cheques payable to the Strategy Institute Inc. and write the registrant's name on the face of the cheque.

Group Discount: A Group Discount is offered for this conference (not in combination with any other offer). To be eligible for the Group Discount, delegates MUST register at the same time. The total discount per delegate (including applicable group discounts, etc.) MUST not exceed 25% of the regular conference cost.

Cancellations: Cancellations must be received in writing by **November 5th, 2021**. Cancellations received by this date will be eligible for a prompt refund less \$99.00 plus administration fee. If you register for the program and do not attend, you are liable for the full registration fee unless you cancel according to the terms stated above. If you are unable to attend, delegate substitution is permitted up to, and including, the day of the conference.

Admission Policy: Strategy Institute reserves the right to restrict entry to the conference to any individual. Any such person requested to leave the conference site shall do so immediately upon request, whether previously issued a badge permitting entry. There is no refund payable with

respect to anyone refused entry. Any information obtained at the conference cannot be relied upon for any particular set of circumstances, cannot be taken as professional advice or opinion. Attendees must consult with the appropriate professional before acting in response to information obtained at the conference.

Evening Social Activities: Please drink responsibly. Strategy Institute shall not be liable for any consequential damages and/or personal injuries caused by excessive or irresponsible alcohol consumption.

Register Online at FinancialDigitalMarketingUS.com