



11th Annual

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

# PAST ATTENDEE LIST

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

November 7-8, 2024

## Sample Past Attendee List

COMPANY	JOB TITLE
Academy Mortgage Corporation	Digital Strategy Vice President, Business
Affinity Federal Credit Union	AVP, Digital Experience
Affirm	Marketing Analytics Manager
Alantra	Vice President, Business Development & Marketing
Ally Financial Services	Director, Email Marketing & Domain Management
American Express Company	Director, People Based Marketing & International Media
American Express Company	Director, Performance Marketing Analytics
American International Group (AIG)	Head of Digital, US & Canada
Ameriprise Financial, Inc.	Senior Manager, Paid Media
Ameritas	Senior VP & Chief Marketing Officer
Amica Mutual Insurance Company	Senior Assistant Vice President, Marketing
AmTrust Financial	Chief Marketing Officer
Apple Bank	First Vice President, Marketing Director
Apple Bank	Vice President, Digital Strategy & Marketing Intelligence
Ascentium Capital	VP, Marketing
Associated Credit Union	Vice President, Marketing
Axos Bank	VP, Brand & Content
Baldwin Risk Partners	Senior Director, Enterprise Digital Marketing
Banco Santander	Senior Director
Bank of America Corporation	Global Head of Product & Client Commercialization
Bank of America Corporation	Managing Director, Global Transaction Services
Bank of China	AVP, Policy Advisory & Risk Governance

## Sample Past Attendee List

COMPANY
Bank of New York Mellon Corporation
Bank of New York Mellon Corporation
Barclays
Bayview Asset Management
Beacon Federal Credit Union
Blackstone Group
Blackstone Group
BMO Harris Bank
BNP Paribas
BOK Financial
Brown Brothers Harriman & Co.
Canada Life
Canadian Western Bank
Capital One Financial
Capital One Financial
Cenlar FSB
Charles Schwab
CI Financial
CIBC
CIBC
CION Investments
Citibank

JOB TITLE
VP, Digital Marketing Technology Development & Integrations
Product Team Lead, Digital Client Experience
Messaging Engineer
Head of Marketing, Consumer Lending Fintech
Vice President, Business Development & Marketing
Vice President, Martech
Global Head of Marketing
VP, Senior Digital Product Owner
IT Director
SVP, Marketing
Head of Marketing
Associate Manager, Marketing
Creative Director & AVP, Creative Services
Vice President, Public Relations
Senior Director
Team Lead, Funding
Director, Financial Planning & Investor Engagement (Digital)
Chief Digital Officer
Senior Director, Marketing
Executive Director
Assistant Vice President
SVP, Advertising & Branding

## Sample Past Attendee List

COMPANY
Citibank
Citizens Financial Group
Citizens Financial Group
City National Bank
CNO Financial Group
Columbia Threadneedle Investments
Combined Insurance
Comerica Bank
Crawford & Company
Customers Bank
Delta Community Credit Union
Depository Trust & Clearing Corporation (DTCC)
Discover Financial Services
Dow Jones
Dow Jones
E*TRADE (from Morgan Stanley)
Edward Jones
Epoch Investment Partners
Equifax
Equitable Bank
Equitable Holdings
EZCORP

JOB TITLE
Vice President, Digital Acquisition Marketing
SVP, Head of Digital Acquisition & Customer Experience
VP, Product Marketing Strategy (Credit Card & BNPL)
Vice President, Events Marketing
Director, Ecommerce
Senior Manager, Paid Media
Chief Executive Officer
Vice President, Digital Marketing
Vice President, North America Marketing
SVP, Digital Marketing
Vice President, Digital Strategy
Executive Director, Global Account Management
Vice President & Head of Marketing & Product Management
Senior Vice President, Brand Marketing
Senior Vice President, Innovation & Technology Partnerships
Vice President
Director, Marketing
Managing Director, Marketing
VP, Tech & Media Platforms
Senior VP, Sales & Marketing
Senior Director
Head of Growth Marketing

## Sample Past Attendee List

COMPANY
Fidelity Life
Fidelity Investments
Firefighters First Credit Union
First Bank
First Midwest Bancorp
First National Bank
First Seacoast Bank
Fiserv
Fora Financial
Franklin Templeton Investments
Georgia United Credit Union
Goldman Sachs
Granite State Credit Union
GreenPath Financial Wellness
Guardian Life Insurance
Guardian Life Insurance
Gulf Winds Credit Union
Habib American Bank (HAB Bank)
Haverford Trust Company
Hightower Advisors
HomeStreet Bank
Horizons Exchange Traded Funds

JOB TITLE
Director, Marketing & Business Development
B2B Digital Marketing Lead
Director, Marketing
VP, Marketing
Senior VP & Director, Digital Marketing Strategy & Programming
Director, Digital & Direct Marketing
Vice President, Marketing & Public Relations
Senior Vice President, Enterprise Marketing
VP, Marketing
Institutional Marketing Head (US)
VP, Marketing
Vice President
Senior Vice President, Member Experience
Chief Marketing Officer
Chief Marketing Officer
Head of Owned Channels
Assistant VP, Marketing
Senior Executive Vice President
Vice President & Director, Marketing
Executive Director, Marketing
Senior Vice President, Retail Banking Senior Operations Manager
Executive Vice President, Head of Marketing

## Sample Past Attendee List

COMPANY
Houlihan Lokey
HSBC Bank Canada
HSBC Bank Canada
Huntington National Bank
iCapital Network
IGM Financial Inc.
Intercontinental Exchange (ICE)
JMMB Group
Jovia Financial Credit Union
JPMorgan Chase & Co.
JPMorgan Chase & Co.
JPMorgan Wealth Management
Kapitus
KeyBank
KeyBank
Kotak Mahindra Group
Laurel Road Bank (a KeyBank brand)
Lazard
LendingTree
Liberty Mutual
Lord, Abbett & Co.
M&T Bank

JOB TITLE
Chief Marketing Officer
Senior VP, Advertising & Marketing, Strategic Sourcing
Head of International Segments, Customer Growth & Partnerships
Assistant VP, Digital Marketing Optimization Lead
SVP, Head of Digital Marketing
Director, Marketing Operations
Chief Marketing Officer
Group Chief Marketing Officer
Assistant VP, Marketing
Vice President, Advanced Analytics & Marketing Insights
Marketing Director
VP, US Wealth Management   Paid, Organic & Creative Strategy Lead
Vice President
SVP, Business Technology Executive – Conversational AI Enterprise Delivery
VP, Consumer Bank Strategy
Senior Vice President, Digital Banking
Chief Marketing Officer
Global Head of Digital
Media Director, Brand
Director, Product Marketing & Advanced Analytics
Head of Digital Experience
SVP, Senior Digital Engagement Manager

## Sample Past Attendee List

COMPANY
Marsh
Maspeth Federal Savings
MassMutual
Mastercard
MasterCard
Matthews Asia
Maybank
Meridian Credit Union
MetLife
MetLife
MFA Asset Management
MissionSquare Retirement
Missouri Credit Union
Mizuho Americas
Morgan Stanley
Morgan Stanley
Morgan Stanley Wealth Management
Morningstar, Inc
Morningstar, Inc
Mountain America Credit Union
Movement Mortgage
Mutual of America

JOB TITLE
SVP, Strategic Data Delivery, Derivation & Insight
President & CEO
Director, Marketing & Customer Experience Group (Client Acquisition)
Senior Vice President, Marketing Services
SVP, Global Loyalty - Offers
Vice President & US Intermediary Marketing Head
SVP & Head of Pricing & Data Analytics
Chief Marketing Officer & Senior VP, Retail Banking
Senior Vice President, Marketing & CX
Chief Marketing Officer
Chief Marketing Officer
Chief Marketing Officer
Vice President, Marketing
VP, US Head of Equity Valuations & Leveraged Capital Markets Valuations
VP, B2B Marketing
Managing Director, CRM & Digital Martech
Executive Director, Digital Marketing
Global Head of Marketing
Director, Demand Generation & ABM
Senior VP, E-Marketing
Regional Director, Marketing
SVP, Customer Experience Strategy

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COMPANY
Mutual of America
National Bank Financial
Nationwide Mutual Insurance Company
Neo Financial
Neuberger Berman LLC
New York Community Bank
New York Life Insurance Company
New York Life Insurance Company
NJM Insurance Group
Nomura
North Shore Bank
Northern Trust
Northern Trust
Northwestern Mutual
Northwestern Mutual
Oaktree Capital Management
Old National Bank
Pacific Western Bank
Patriot Bank
PayPal
Paysafe Group
Penn Mutual

JOB TITLE
Vice President, Digital & Social Media Strategy
Digital Strategist
Director, Social Media
Head of Communications
VP, Digital Project Manager
First Vice President
Corporate Vice President
Director, Content Strategy, Planning & Management
Digital Marketing Strategy Leader
Project Manager
VP & Director, Marketing
Senior Vice President, Marketing Director - West Region
Chief Marketing Officer
VP, Digital Marketing
VP, Client Experience
Assistant Vice President, Corporate Communications
SVP & Director, Digital Marketing Strategy
VP, Commercialization, Treasury Management
VP, Marketing
Head of Consumer Marketing
Senior Marketing Services Coordinator
AVP, Product Marketing



## Sample Past Attendee List

COMPANY
PenFed Credit Union
People Driven Credit Union
Pershing
Piedmont Advantage Credit Union
PIMCO
PNC Financial Services Group
Polen Capital
Ponce Bank
Primerica
Prudential Financial
Prudential Financial
Pzena Investment Management
Quantitative Brokers
Quontic Bank
Raisin
Regions Financial
Ridgewood Savings Bank
Rockefeller Capital Management
Rocket Mortgage
Royal Bank of Canada
S&P Global
Schroders

JOB TITLE
Chief Marketing Officer
VP, Marketing
Vice President
Chief Marketing Officer
Vice President
Product Management Associate
Chief Marketing Officer
SVP   Director, Marketing & Designer-in-Residence
Division Leader
VP, Digital Marketing
Vice President & Global Creative Director
Director, Marketing Operations
Head of Marketing
Senior VP, Marketing
CMO & President
Senior VP & Digital Marketing Strategist
Chairman, President & Chief Executive Officer
Senior Vice President & Director, Marketing
Senior Multicultural Marketing Strategist
Vice President, Intermediary Marketing
Director, Data Governance & Quality
Head of Digital, Americas

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COMPANY
Schroders
Scotiabank
Seacoast Bank
SEI Investments
Selective Insurance Group
Societe Generale
State Street Global Advisors
State Street Global Advisors
Sun Life Financial
Swiss Re
Synchrony Financial
T. Rowe Price
TD Bank Group
TD Bank Group
TD Wealth - Private Giving Foundation
Tompkins Financial
Travelers
Truist
UBS Canada
UBS Canada
UFG Insurance
UMB Bank

JOB TITLE
Digital Marketing Lead, Americas
Vice President, Enterprise Digital Marketing
Senior VP, Digital Marketing
Director, Marketing & Communications
Head of Digital Marketing
Managing Director
VP, Digital Marketing
Global Head of Digital Asset & Technology Design
Director, International Life Marketing
Vice President & Senior Economist
SVP, Chief Marketing Officer
VP, Senior User Experience Design Manager
SVP, Digital Marketing Strategy
SVP & Executive Product Owner, US Digital Channels
Head of Product Growth & Analytics   Digital Platforms
Assistant VP & Marketing Officer
VP, Consumer Marketing
Assistant Vice President, Direct & Digital Marketing
Director, Digital Marketing
Executive Creative Director
AVP, Surety Marketing Manager
Executive VP, Interactive Marketing

## Sample Past Attendee List

COMPANY	JOB TITLE
United Nations Federal Credit Union	Chief Marketing Officer
United States Liability Insurance (USLI)	2nd VP & Director, Insurance Training & Educational Program Development
US Bank	Executive Vice President, Chief AI & Analytics Officer
US Bank	VP, Digital Platform Optimization
Vanguard	Martech Lead
Visa	Martech Lead
Webster Bank	Senior Managing Director, Enterprise Products & Digital Banking
Webster Bank	Managing Director, Digital Bank Growth Strategy
Wells Fargo	VP, Strategy, Digital & Innovation
Wilmington Trust	Senior Vice President
Woodruff Sawyer	VP, Marketing
World Financial Group	Senior Director, Marketing

## Secure Your Spot Now

11th Annual

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

We have a limited number of speaking opportunities and they sell out quickly! Connect with our community of **intent-based buyers** ready to invest in your solution.

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



**Darren Haughian**  
Sponsorship Director

Call: 1-866-298-9343 x 276  
[darren@strategyinstitute.com](mailto:darren@strategyinstitute.com)



## Upcoming Events in this Market Segment

9th Annual

### **Digital Marketing** for **Financial Services** Summit **WEST**

Spring 2024

14th Annual

### **Digital Marketing** for **Financial Services** Summit **CANADA**

Spring 2024

6th Annual

### **Digital Marketing** for **Financial Services** Summit **MIDWEST**

Fall 2024