

**Digital Marketing** *for*  
**Financial Services**  
— Portfolio of Events 2024-2025

**GROW YOUR  
FINANCIAL  
SERVICES  
MARKET  
SHARE**



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

## UPCOMING EVENTS

1	6th Annual <b>Digital Marketing for Financial Services Summit</b> MIDWEST	OCTOBER 9-10, 2024 CHICAGO
2	11th Annual <b>Digital Marketing for Financial Services Summit</b> NEW YORK	NOVEMBER 7-8, 2024 NEW YORK
3	10th Annual <b>Digital Marketing for Financial Services Summit</b> WEST	APRIL 9-10, 2025
4	15th Annual <b>Digital Marketing for Financial Services Summit</b> CANADA	JUNE 11-12, 2025 TORONTO

- The **largest** and **longest-serving portfolio** of digital marketing for financial services events in North America for more than **14 years**
- **4 annual conferences** that solidify our reputation as a leader in the financial marketing space
- **10,000+ 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

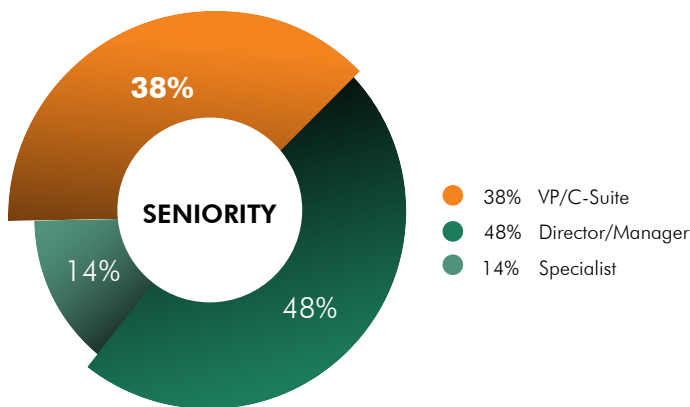
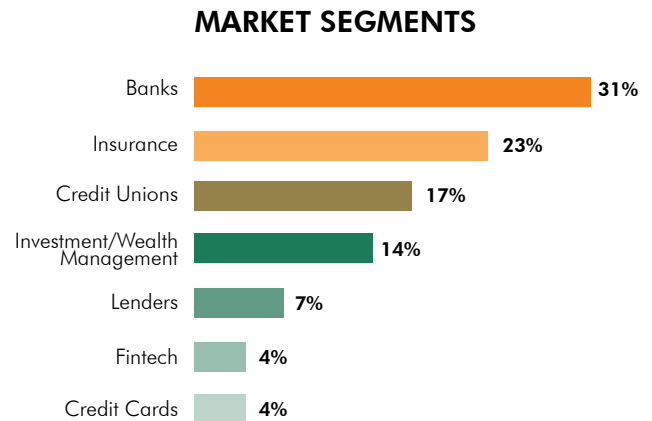
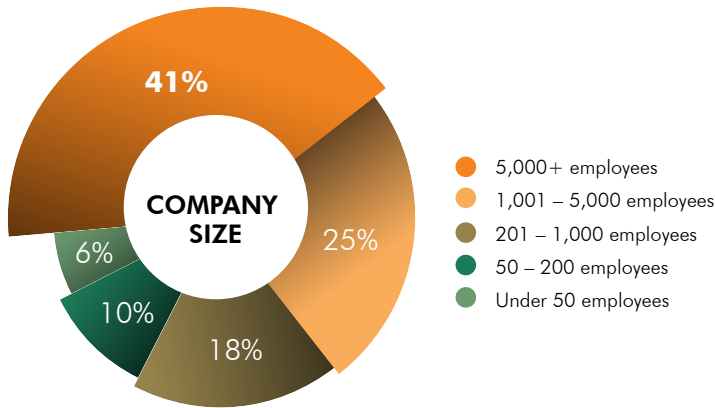
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6th Annual  
**Digital Marketing** for  
**Financial Services**  
**Summit** **MIDWEST**

OCTOBER  
 9-10, 2024  
 CHICAGO

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

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



**KEY METRICS**

- Director+** qualified leads
- 68%** of attending companies generate \$100M+ in revenue
- 66%** of attending companies have 1,000+ employees

CONTINUED PAST SPEAKERS, ATTENDEES AND SPONSORS...



**PAST SPEAKERS**



**Koley Corte**  
 SVP & Global Head of  
 Business Transformation  
**AllianceBernstein**



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



**Matt Beckman**  
 VP, Digital Platform Optimization &  
 Digital Lifecycle Marketing  
**U.S. Bank**



**Vijay Konduru**  
 EVP & CMO  
**Huntington  
 National Bank**



**Monu Kalsi**  
 VP, Marketing  
**CNO Financial Group**



**Amit Pandya**  
 Director, Head of Digital  
 Strategy & Platforms  
**New York Life  
 Insurance Company**



**Nathan Rivera**  
 Second VP, Digital  
 Channels & Products  
**Ameritas**



**Julissa Bonilla**  
 AVP, Digital Marketing, Digital  
 Platform Field Engagement & Adoption  
**Morgan Stanley**

**PAST ATTENDEES**



**PAST SPONSORS**

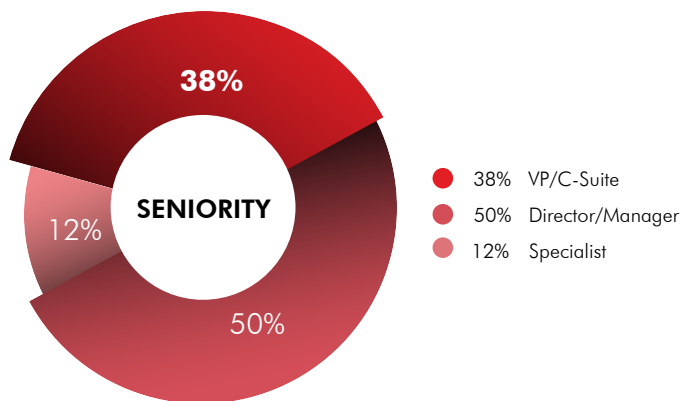
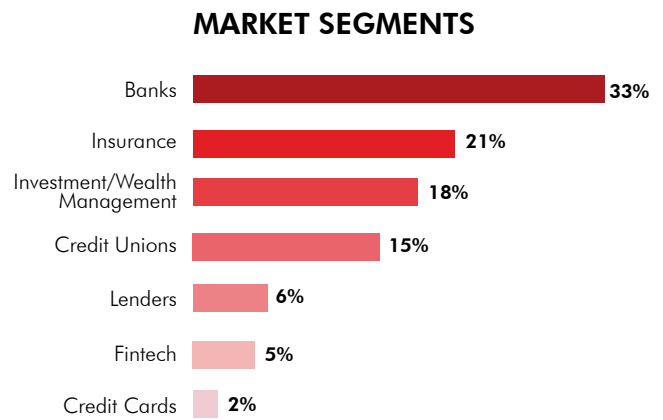
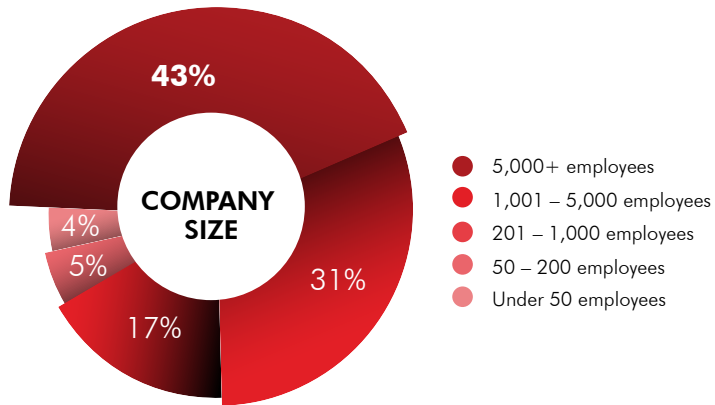


**11th Annual**  
**Digital Marketing** for  
**Financial Services**  
**Summit** **NEW YORK**

**NOVEMBER**  
**7-8, 2024**  
**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.



**KEY METRICS**

- Director+** qualified leads
- 70%** of attending companies generate \$250M+ in revenue
- 74%** of attending companies have 1,000+ employees



**CONTINUED PAST SPEAKERS, ATTENDEES AND SPONSORS...**



**PAST SPEAKERS**



**Alex Sion**  
 Head of Global Consumer  
 Banking, Citi Ventures  
**Citi**



**Amy Hu**  
 SVP & CMO  
**New York Life**  
**Insurance Company**



**Rich Smith**  
 Chief Product &  
 Marketing Officer  
**PenFed Credit Union**



**Bjorn Austraat**  
 SVP & Head of AI Acceleration  
**Truist**



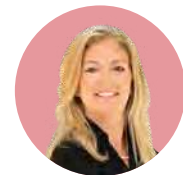
**Amresh Mathur**  
 SVP, Head of Digital Acquisition  
 & Customer Experience  
**Citizens**



**Brent Korte**  
 SVP & CMO  
**Ameritas**



**Jaime Kalfus**  
 Head of Global Brand  
 Development & Engagement  
**PGIM**



**Susan Grossman**  
 EVP, Marketing Services  
**Mastercard**

**PAST ATTENDEES**



**PAST SPONSORS**





3

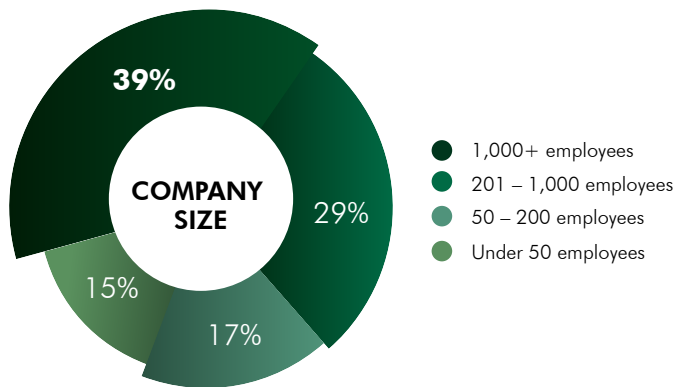
10th Annual

# Digital Marketing for Financial Services Summit WEST

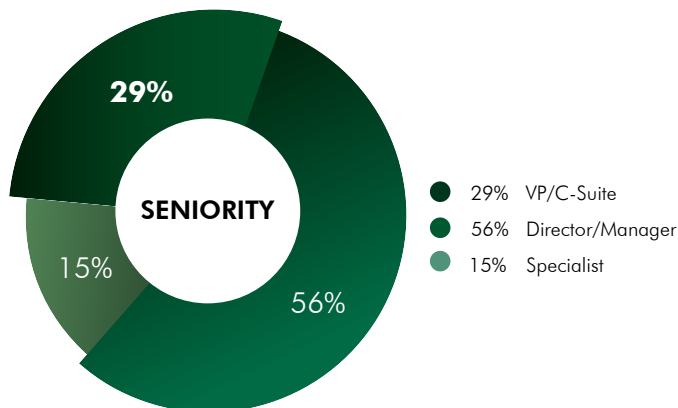
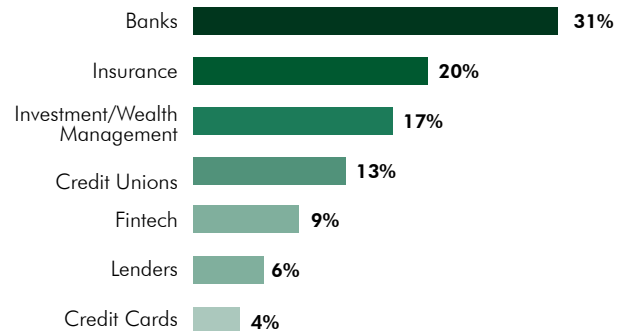


The only event series targeting financial marketers in the West

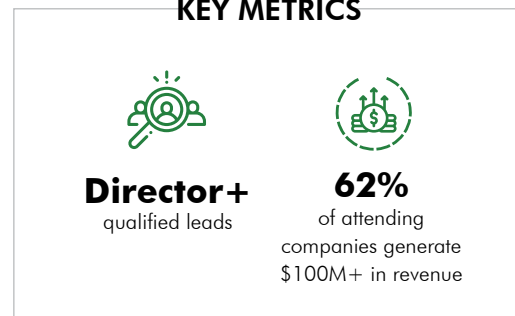
This exclusive conference attracts **financial services decision-makers** in the West who are actively looking for solutions to advance their digital marketing.



### MARKET SEGMENTS



### KEY METRICS



CONTINUED PAST SPEAKERS, ATTENDEES AND SPONSORS...



**PAST SPEAKERS**



**Maha Madain**  
 Chief Marketing Officer  
**Santander**



**Ravi Misquitta**  
 SVP, Marketing Strategy  
 & Technology  
**Franklin Templeton**



**Sayeed Sanallah**  
 SVP, Corporate Strategy  
 & Development  
**Wells Fargo**



**Nidhi Daga**  
 SVP, Growth, Digital Platform  
**J.P. Morgan**



**Ben Stuart**  
 Head of US Marketing Strategy & Integration  
**BMO Financial**



**Jackie Buonassisi**  
 VP, Omnichannel Group  
**U.S. Bank**



**Eileen Loustau**  
 SVP, Head of Marketing (CMO)  
**Chevron Federal  
 Credit Union**



**Kevin Plumberg**  
 Head of B2B Content  
 Marketing, Bank of the West  
**BNP Paribas**

**PAST ATTENDEES**



**PAST SPONSORS**



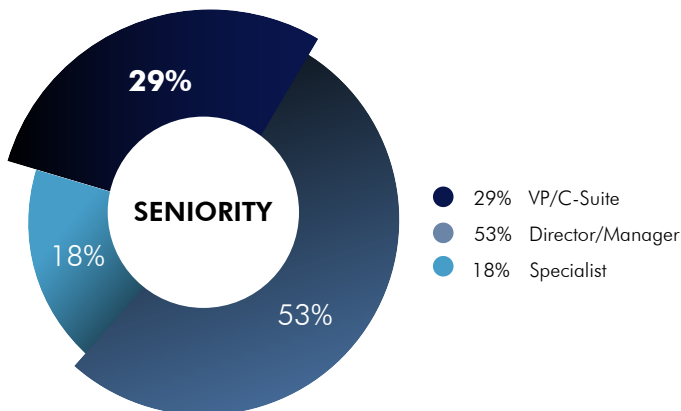
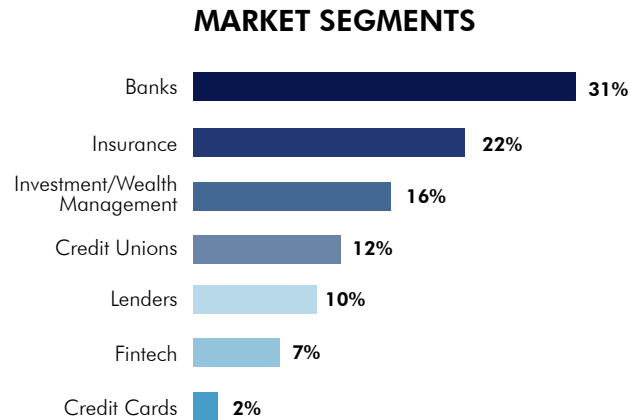
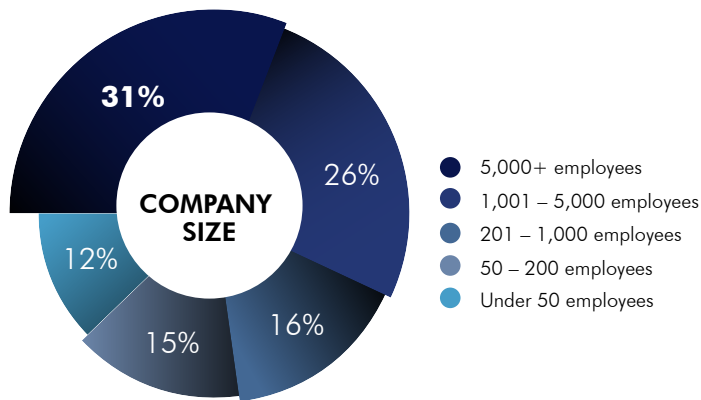
15th Annual

# Digital Marketing for Financial Services Summit CANADA

JUNE  
 11-12, 2025  
 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.



**KEY METRICS**

- Director+** qualified leads
- 63%** of attending companies generate \$250M+ in revenue
- 57%** of attending companies have 1,000+ employees



CONTINUED PAST SPEAKERS, ATTENDEES AND SPONSORS...



## PAST SPEAKERS



**Betsey Chung**  
 SVP & CMO, Canada & Global  
 Digital Marketing Officer  
**TD Bank**



**Alan Depencier**  
 CMO, Personal, Commercial  
 Banking & Insurance  
**RBC**



**Renu Sihra Sehmi**  
 Head of Enterprise Digital  
 Marketing Operations  
**Scotiabank**



**Andy Taylor**  
 President & CEO  
**Gore Mutual  
 Insurance**



**Soumia Zehri**  
 Director, Digital  
 Marketing & Growth  
**National Bank of Canada**



**Eugene Wen**  
 VP, Group Advanced Analytics  
**Manulife**



**Maurice Cacho**  
 Director, Digital Marketing  
**Fidelity Investments  
 Canada**



**Kobi Gulersen**  
 VP, B2B, Product &  
 Partner Marketing  
**Mastercard Canada**

## PAST ATTENDEES



## PAST SPONSORS



# SPONSOR TESTIMONIALS

“

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 ... 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**

“

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**

“

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.

**Phase5**

“

Very positive. Everything ran seamlessly ... We were able to mingle with lots of attendees! ... Happy hour and roundtables were perfect ... This was a great experience.

**Red Marker**

“

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**

“

Good leads! As an account executive these conversations are key to our business.

**SITECORE**



# YOUR SPONSORSHIP PACKAGES

13th Annual  
Digital Marketing *for*  
Financial Services  
Summit



## 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 in-person and virtual exhibit booth.
- The package also includes:
  - A comprehensive brand awareness and co-marketing campaign to 10,000+ financial marketing buyers
  - Strategic onsite and pre-event positioning and branding
  - Access to the complete delegate and speaker list
  - 3 delegate 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 in-person and virtual exhibit booth.
- The package also includes:
  - A comprehensive brand awareness and co-marketing campaign to 10,000+ financial marketing buyers
  - Strategic onsite and pre-event positioning and branding
  - Access to the complete delegate and speaker list
  - 3 delegate passes for your team
  - 10 additional complimentary passes to invite your clients and prospects





# YOUR SPONSORSHIP PACKAGES

Digital Marketing *for*  
Financial Services

Summit CANADA



## 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 in-person and virtual exhibit booth
  - Comprehensive brand awareness and co-marketing campaign to 10,000+ financial marketing buyers
  - Strategic onsite and pre-event positioning and branding
  - Access to the complete delegate and speaker list
  - 2 delegate 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 delegate passes for your team
  - Strategic onsite and pre-event positioning and branding 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

Call: 1-866-298-9343 x 276  
darren@strategyinstitute.com



6th Annual

**Digital Marketing** *for*  
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Summit **MIDWEST**

OCTOBER  
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CHICAGO  
[www.financialdigitalmarketingmidwest.com](http://www.financialdigitalmarketingmidwest.com)

11th Annual

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10th Annual

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Summit **WEST**

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[www.financialdigitalmarketingwest.us](http://www.financialdigitalmarketingwest.us)

15th Annual

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