



11th Annual

Digital Marketing *for* Financial Services Summit

NEW YORK

The only event series designed for financial services marketing & digital leaders

November 7 & 8, 2024 | New York Hilton Midtown

Driving customer growth through impactful digital marketing & experience strategies

Expert speakers include:



Lynn Teo
Chief Marketing Officer
Northwestern Mutual



Jennifer Ball
Chief Marketing Officer
Franklin Templeton



Judy Edelson
Chief Marketing Officer
Apple Bank



Alex Hachey
Vice President, Director of
User Experience Design
T. Rowe Price



Matt Lesle
Managing Director, Global
Head of Digital Product
J.P. Morgan Asset
Management

Welcome, Financial Services Growth Leaders!

Dear Colleagues,

Welcome to the 11th New York edition of the DMFS Summit, the flagship annual event of the DMFS series, which brings together **the most innovative, engaged and influential financial services leaders driving customer growth.**

The Summit is designed to support marketing, digital and experience leaders across a wide range of financial services with **strategic guidance, practical tips, effective tools and innovative technology**, delivered by the brightest minds in the industry.

We have curated a two-day agenda, packed with case studies, workshops, panel discussions and roundtables that will provide you with an actionable plan on how to **accelerate your marketing transformation, utilize marketing insight and analytics, enable personalized engagement, optimize creative processes with GenAI technologies, launch effective multichannel marketing campaigns** and much more.

Join us to **source best practices from market-leading brands like Prudential Financial, J.P. Morgan, Fidelity Investments, State Street, Columbia Threadneedle Investments and make lasting business connections** that will help you excel in your transformation journey.

We look forward to welcoming you into the DMFS community and hosting you this November!



Taya Prokopenko
Head of Content, Digital Marketing for Financial Services
Strategy Institute
Taya@strategyinstitute.com



Why Attend?

- 1** **Benchmark and create a robust business strategy** that will result in sustainable customer growth
- 2** **Maximize ROI** through expertise-sharing on how to leverage the latest innovative technologies and practices
- 3** **Set up an effective organization**, empowered by data, tools and the right talent to achieve customer primacy
- 4** **Gain actionable insights** on how to stand out and grow in a crowded market
- 5** **Build relationships** with the most engaged and influential thought leaders in the industry
- 6** **Discover potential partners** that will help you take your business to the next level

“One of the best parts about events like this is actually getting to hear case studies, instead of the op-ed pieces that you can read about in a blog. Really seeing the strategy go through with the analytics and results has been very helpful for us.”

Lincoln Financial Group – Past Delegate



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Agenda at a Glance

The DMFS New York Summit is the flagship edition of North America's most exclusive and longest-running digital marketing and growth event series designed for the needs of the financial services industry. Join us to discuss best practices on:

- 1 Empowering your business to make data-driven decisions to unlock the full potential of your marketing investments**
- 2 Building and scaling hyper-personalisation capabilities in the age of first-party data**
- 3 Enabling an agile marketing organization and structuring empowered teams to respond to real-time business and consumer needs**
- 4 Re-establishing the value of marketing as a growth centre vs cost centre and aligning your business for digital growth**
- 5 Analysing most impactful GenAI use cases and moving them through pilot and execution stage**
- 6 Orchestrating omnichannel marketing campaigns and continuous customer experience**
- 7 Enabling sales and business development teams through content, automation and AI-powered tools**
- 8 Scaling content creation abilities and measuring content effectiveness across channels**
- 9 Adapting to the future of SEO, SEM and paid media to maintain reach and engagement**
- 10 Making better data-driven decisions rooted in strong attribution strategies and insight maturity**



NEW WORKSHOPS

- AGILE MARKETING STRATEGY**
Enabling Capacity Scaling Through an Agile Marketing Setup.
- MARTECH STACK MATURITY AND OPTIMIZATION**
Moving Your Organization to the Next Step of Your Martech Maturity to Optimize Value.
- EXPERIENCE NARRATIVES" DESIGN THINKING METHODOLOGY**
Develop a Holistic Guided Client Experience Full of Omnichannel Automated Nurture Messaging.
- USING DATA TO SHRINK THE AUDIENCE BULLSEYE**
Using Company, Customer, Channel, and Contextual Data to Multiply the Impact of Marketing



NEW ROUNDTABLES INCLUDE

- WEBSITE AI BOTS**
Effectively Integrating Website Chatbots to Drive Conversion, Customer Engagement, and Brand Experience.
- BITE-SIZED VS LONG-FORM CONTENT**
Boosting Engagement Through Short Video Formats and Tying Vanity Metrics into Growth and Business Impact.
- BEST TIPS ON META AND LINKEDIN MARKETING**
What Can the Financial Services World Learn from Influencers?
- DOING MORE WITH LESS**
Leveraging Existing Resources to Attract More Customers Today.

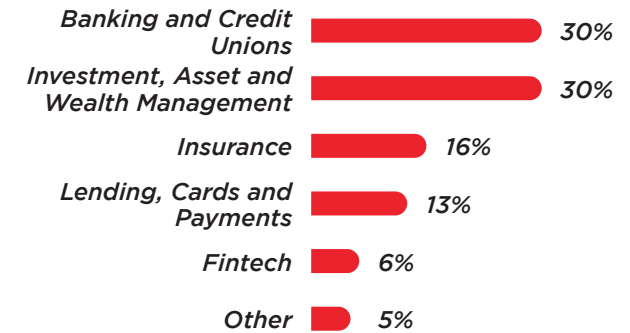


Who Attends

Network with senior peers from North America's top financial brands:



Market Segment



Marketing

C-Suite/SVP/VP/Director/
Manager of:

Marketing Operations,
Marketing Strategy, Digital
Marketing, Customer/
Client/Consumer
Engagement, Social Media,
Content, Brand, Media,
Communications, Creative,
Advertisement, Product
Marketing, SEO, SEM,
Growth



Customer Experience

C-Suite/SVP/VP/Director/
Manager of:

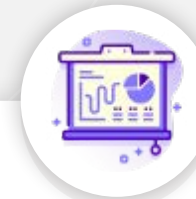
Customer/Client
Experience, Customer
Insight & Analytics,
Customer Journey



Digital

C-Suite/SVP/VP/Director/
Manager of:

Digital Transformation,
Digital Strategy, Digital
Innovation, Digital
Experience, Digital
Distribution, Digital Product,
Personalization.



Data Analytics & Insights

C-Suite/SVP/VP/Director/
Manager of:

Marketing Analytics,
Customer Insight



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Chief Marketing Officer
Northwestern Mutual



Jennifer Ball
Chief Marketing Officer
Franklin Templeton



Judy Edelson
Chief Marketing Officer
Apple Bank



Lisa Zakrzewski
Chief Marketing Officer
Leverage Retirement



Andy O'Rourke
Chief Marketing Officer
Direxion



Jeff Biesman
Chief Marketing Officer
National Debt Relief



Dwight Flenniken
Chief Marketing Officer,
Executive Vice President
Sunwest Bank



John Renz
Vice President, Head of
Creative, US Businesses
Prudential Financial



Mitch Rose
Executive Director,
Digital Strategy - Content
J.P. Morgan



Julienne Redmond
Vice President
Fidelity Investments



Jill Perlberg
Vice President, Content &
Client Marketing
Northwestern Mutual



Alex Hachey
Vice President,
Director of User
Experience Design
T. Rowe Price



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Managing Director,
Global Head of Digital
Product
**J.P. Morgan Asset
Management**



Emily Childers
Head of Growth
Marketing
Credit Karma



Jeff Cohan
Senior Vice President,
Digital Marketing
Hartford Funds



Donna Jermer
Executive Vice President,
Chief Marketing Officer
Insuritas



Scott Spidell
Vice President,
Strategic Marketing
**First Command
Financial Services**



Lara Coleman
Executive Director,
Advertising & Content
Marketing
FS Investments



Kaitlyn Crowder
Vice President,
Marketing Director
North Avenue Capital



Jeff Gardner
Executive Vice President,
Sales & Marketing
Mutual of Enumclaw



Candis Curd
Director of Digital
Strategy &
Transformation,
GenAI & Emerging
Technologies
Unum



Allison Knightly
Marketing Director, Head
of US Paid Media
**Columbia
Threadneedle
Investments**



Mark Reese
Marketing Director
Tri-Merit



Amber Wuollet
Director of Product
Marketing
Curi



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Kristen Carloni
Global Head of Business
Proposal Team, Aladdin
BlackRock



Katherine Lucas
Head of Marketing &
Commercialization
State Street



Mark McClusky
Head of Content
Harding Loevner



Jennifer Taylor
Head of Digital,
Commercial Bank
Axos Bank



Rachel Bourne
Head of Bank
Partnerships
MaxMyInterest



David Master
Former Chief Marketing
Officer
**Janus Henderson
Investors**



David Blackburn
Former Executive
Director, Head of Digital
Marketing
ProShares



Tim Hines
Fractional Chief
Marketing Officer
**Marketing Starter
Group**



Stephen Diorio
Managing Director
**Revenue Enablement
Institute**



Danielle Darling
Financial Advisor
LPL Financial



Rick Lake
University Lecturer,
Questrom School of
Business
Boston University



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Meet the DMFS Advisory Board



Donna Doleman Dickerson
Chief Marketing Officer
University of Michigan Credit Union



Andy O'Rourke
Chief Marketing Officer
Direxion



Donna Jermer
Executive Vice President,
Chief Marketing Officer
Insuritas



John Renz
Vice President, Head of Creative, US Businesses
Prudential Financial



Mitch Rose
Executive Director,
Digital Strategy - Content
J.P. Morgan



Kristi Daraban
Associate Vice President,
Marketing - Social Media
Nationwide



Erin Wilson
Vice President,
Marketing
HomeEquity Bank



Scott Spidell
Vice President, Strategic Marketing
First Command Financial Services



Marco Carrucci
Vice President,
Marketing
TradeStation



Dan Moshkovich
Vice President,
Marketing
Chargeflow



LeAnita Ragland-Brooks
Former Managing Director & Vice President,
Strategic Relationship Management
Prudential Financial



Stephen Diorio
Managing Director
Revenue Enablement Institute



KEYNOTE PRESENTATION: BUILD COMMUNITY CONTACTS

7:30 AM

WELCOME FROM THE EVENT DIRECTOR

8:30 AM

Taya Prokopenko

Head of Content, Digital Marketing for Financial Services,

Strategy Institute



OPENING REMARKS FROM THE CHAIRPERSON

8:40 AM

KEYNOTE PRESENTATION: MARKETING TRANSFORMATION

9:00 AM

Unlocking the Value of Marketing to Drive Customer Experience and Growth Through Structural Transformation

Ensure your marketing organization endures with relevance and value through the waves of disruption. You'll walk away with an action plan on how to create a team fit for the future through:

- Identifying and harnessing the strengths of your existing marketing function.
- Creating digitally enabled team structures that support innovation.
- Bringing together cross-functional problem-solving and collaboration.

Drive long-term resilience and growth through a digital and data-enabled organization.

Lynn Teo,

Chief Marketing Officer

Northwestern Mutual



KEYNOTE PANEL DISCUSSION: MULTI-CHANNEL MARKETING ATTRIBUTION STRATEGIES

9:30 AM

Enabling Your Business to Make Better Connections Between Marketing Tactics and ROI

Accurately measure and optimize your marketing investment and campaign effectiveness considering multiple channels and touchpoints along the customer journey while avoiding common attribution pitfalls. Discover winning strategies, techniques, and tools to:

- Leverage attribution data to optimize marketing spend and drive business growth.
- Integrate multi-touch attribution models into your marketing analytics.
- Inform your marketing strategy decisions in scenarios where you don't have access to standard attribution data.

Empower your business to make data-driven decisions and unlock the full potential of your marketing investments.

Jeff Biesman

Chief Marketing Officer,

National Debt Relief



Andy O'Rourke

Chief Marketing Officer

Direxion



Jeff Coghan,

Senior Vice President, Digital Marketing

Hartford Funds



Emily Childers,

Head of Growth Marketing

Credit Karma



10:10 AM

INDUSTRY EXPERT PRESENTATION: AI-POWERED ADVANCED ANALYTICS

Deciphering Multi-Touch Attribution Complexities and Predicting Future Marketing Outcomes Through Analytics-Driven Optimization

Utilize AI-powered analytics tools to harness the power of data to drive growth, enhance customer engagement, and stay ahead of the competition. Leave this session empowered with practical tips on how to:

- Unravel intricate customer journeys to improve conversion attribution.
- Capture the true impact of each marketing touchpoint by leveraging AI algorithms.
- Accurately forecast future marketing outcomes

Enable more informed decision-making and resource allocation to optimize your campaign performance, anticipate market trends, and stay ahead of the competition.

10:40 AM

SPEED NETWORKING

10:50 AM

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

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

Register
online now

**Speak at the
Digital Marketing for
Financial Services
Event of the year!**



10:10 AM

TRACK A:

MARKETING OPERATIONS & DIGITAL ENABLEMENT

CASE STUDY: ENABLING PERSONALIZATION

Enhancing Customer Experience Through a Robust Personalization Strategy

- Assess the impact on your business setup and drive effective change management.
- Use existing data in a more compelling way to enhance personalization.
- Optimize the placement of tools and data to maximize their capabilities.

Master a roadmap for increasing personalization maturity in your organization to enhance your digital experience.

TRACK B:

THE FUTURE OF SEARCH & SOCIAL

PRESENTATION: BRAND AND PRODUCT STORYTELLING IN THE AGE OF GENAI

Optimizing the Role of Generative AI In the Creative Process

- Use ChatGPT and other platforms as a powerful new tool for generating content.
- Manage associated risks and prevent harm to your brand.
- Establish quality standards and controls.

Examine what's needed for brand and product storytelling today, with recommendations for getting better outputs from generative AI.

Mitch Rose
Executive Director,
Digital Strategy - Content
J.P. Morgan



TRACK C:

INTERACTIVE SESSIONS

WORKSHOP 1: AGILE MARKETING STRATEGY

Enabling Capacity Scaling Through an Agile Marketing Setup

- Developing and curating an agile marketing team.
- Transitioning from waterfall to agile and “being agile” vs “doing agile.”
- Having more impactful conversations at the top level, powered by cost-value metrics.

Deliver unprecedented business impact by enabling marketing teams that can pivot quickly to respond to real-time needs.

Scott Spidell
Vice President, Strategic Marketing
First Command Financial Services



Early Bird Offer

Book Your Delegate Pass Now

Early Bird (In Person)

~~\$2,095 USD~~ **\$1,495 USD**

Early Bird (Virtual)

~~\$1,495 USD~~ **\$995 USD**



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12:00 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PRESENTATION: MARKETING TECHNOLOGY ECOSYSTEM

Orchestrating Profitable Digitally Enabled Growth Across Functions

Evolve your martech ecosystem and marketing practices to achieve customer-led growth and a unified commercial strategy. Source practical tips to:

- Modernize legacy technology for synergy between systems, processes, and teams.
- Identify workflow changes and process inefficiencies.
- Align rules, roles, and processes to support desired culture change.

TRACK B: THE FUTURE OF SEARCH & SOCIAL

INDUSTRY EXPERT PRESENTATION: PAID ADVERTISING INTELLIGENCE AND MEASUREMENT

Optimize ROI on Your Paid Media Campaigns Through Intelligent Measurements

Explore advanced measurement techniques and tools that empower you to optimize targeting, messaging, and budget allocation, maximizing the impact of your paid media investments. Adopt best practices to:

- Analyze paid campaign performance holistically to uncover insights.
- Determine key metrics to optimize your campaigns based on your business goals.
- Assess the suitability of intelligent tools for your business needs.



12:30 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

CASE STUDY: THE JOURNEY TOWARDS CUSTOMER-CENTRIC MARKETING

Transforming Your Marketing Organization to Establish Trust, Increase Loyalty and Support Growth

- Utilizing data-driven personalization to tailor interactions and meet individual customer needs through advanced data analytics.
- Achieving organizational alignment by engaging employees and ensuring internal processes are aligned with customer-centric goals.
- Leveraging emerging technologies, such as AI, to innovate and enhance customer experiences, staying ahead of market trends.

Lisa Zakrzewski
Chief Marketing Officer
Leverage Retirement



TRACK B: THE FUTURE OF SEARCH & SOCIAL

FIRESIDE CHAT: CONSUMER ENGAGEMENT IN THE NEW GENERATION

Deciphering the Code to Performance Marketing in a Multichannel Multigenerational Environment

- Engage the millennial audience and expand into GenZ.
- Integrate offline, online, and owned channel strategies.
- Build trust with a younger audience through communities such as TikTok and Reddit.

Enhance your brand's performance and build lasting relationships in today's dynamic multigenerational and multichannel marketplace.



Emily Childers,
Head of Growth Marketing
Credit Karma

TRACK C: INTERACTIVE SESSIONS

WORKSHOP 2: MARTECH STACK MATURITY AND OPTIMIZATION

Moving Your Organization to the Next Step of Your Martech Maturity to Optimize Value

- Perform a martech assessment and audit.
- Identify gaps and prioritize focus areas.
- Make an implementation plan.

David Blackburn
Former Executive Director,
Head of Digital Marketing,
ProShares



01:00 PM

NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

TRACK A CONTINUED: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT LUNCH & LEARN:

TRACK B CONTINUED: THE FUTURE OF SEARCH & SOCIAL

TRACK C CONTINUED: INTERACTIVE SESSIONS



2:00 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

PANEL DISCUSSION: REPLACING THIRD-PARTY COOKIES

Setting Up for Hyper-Personalization Following the Age of Third-Party Data

- Evaluate your lead generation and sales Developing and implementing first-party data strategies to maintain and enhance customer personalization.
- Leveraging customer insight and advanced analytics to predict customer behavior and tailor experiences.
- Ensuring compliance with evolving privacy regulations while delivering personalized marketing campaigns.

Jill Perlberg

Vice President, Content & Client Marketing

Northwestern Mutual



Donna Jermer

Executive Vice President, Chief Marketing Officer

Insuritas



TRACK B: THE FUTURE OF SEARCH & SOCIAL

PANEL DISCUSSION: THE NEW REALITY OF CREATIVE AND MEDIA

Making Your Brand Stand Out in the Saturated and Overwhelming Multichannel Media Environment

- Cut through the noise on social media platforms and mobile devices to reach your target audience.
- Innovate with fresh, creative ideas that resonate across multiple touchpoints, ensuring your brand stays relevant and engaging.
- Planning and executing good creative in a timely manner.

Adapt your brand strategy for success in today's fast-paced, media-saturated world marketplace.

TRACK C: INTERACTIVE SESSIONS

WORKSHOP 3: "EXPERIENCE NARRATIVES" DESIGN THINKING METHODOLOGY

Develop a Holistic Guided Client Experience Full of Omnichannel Automated Nurture Messaging

Strategically plan and automate "always-on" campaigns that deliver an omni-channel experience.

- Ensure your messaging resonates at every touchpoint.
- Discover the power of activation triggers and how to integrate them into your strategic documents for effective planning and execution.

Alex Hachey

Vice President, Director of User Experience Design

T. Rowe Price



"The wealth of experience at the conference is amazing. If you are in the Digital Marketing Field in Financial Services, this is one of the must-see, must-attend conferences."

Macquarie Group – Past Delegate



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2:45 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PRESENTATION: A MODERN APPROACH TO CUSTOMER JOURNEY ORCHESTRATION

Using AI to Improve Customer Experience and Customer Journey Orchestration

Elevate your approach by leveraging AI-driven customer journey orchestration to ensure every interaction is fresh and relevant to each customer. Source practical tips to:

- Activate customer journey data to deliver a personalized experience.
- Orchestrate omnichannel journeys.
- Optimize performance across channels and touchpoints.

Amplify your real-time decisioning tools to deliver personalized conversations at scale.

TRACK B: THE FUTURE OF SEARCH & SOCIAL

INDUSTRY EXPERT PRESENTATION: SOCIAL MEDIA LISTENING STRATEGY

Gain Competitive Advantage by Uncovering Invaluable Consumer Insights

Integrate social listening into your customer-centric strategy to enhance customer engagement and retention. Master the success factors to:

- Translating conversations into actionable business insight that drives revenue.
- Aligning your content and messaging with customer needs and market trends.
- Uncovering industry insights and customer sentiments.

Maintain a positive brand reputation and build a loyal customer base by proactively addressing customer concerns and needs.

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

3:15 PM



INDUSTRY VERTICAL BREAKOUT DISCUSSIONS

3:45 PM

Join vertical-specific marketing strategy and execution discussions to uncover how your peers are prioritizing marketing budgets, deciding their channel strategy, and transforming marketing operations.

BANKING

BANKING

WEALTH AND ASSET MANAGEMENT

Led by:

Rick Lake

University Lecturer, Questrom School of Business

Boston University



CREDIT UNIONS

LENDING

FINTECH AND PAYMENTS

INDUSTRY EXPERT PRESENTATION: WHERE MARTECH MEETS CX AND COMPLIANCE

4:35 PM

Deliver Highly Personalized and Compliant Customer Experience with Zero-Party Data

Leverage zero-party data to create personalized customer experiences while maintaining compliance with data privacy regulations. Leave with an adaptable blueprint on how to:

- Collect and utilize zero-party data to enhance personalization without compromising customer trust.
- Integrate martech solutions that align with compliance requirements and optimize customer interactions.
- Develop strategies for transparent data practices that build stronger, trust-based relationships with your customers.

Transform your customer experience approach by combining martech innovation with robust compliance practices to achieve personalized and trustworthy interactions that drive customer growth.



5:05 PM

ASSET MANAGEMENT SPOTLIGHT PANEL DISCUSSION: IS CONTENT KING?

Using Content as a Driver of Sales and Client Retention in the Asset Management Business

Explore the pivotal role of content in helping drive sales and client retention within the asset management industry, where the only tangible representation of a fund or strategy is through various forms of content. This panel discussion features three senior marketing leaders who will delve into:

- Perspectives on the strategic utilization of content and their approaches to content strategy.
- Structuring and leading content teams.
- The role of technology and AI in content creation, personalization, production and dissemination.

Discover how to effectively leverage content to enhance your sales efforts, build stronger client relationships, and stay ahead in the competitive asset management landscape and other B2B applications.

Jennifer Ball

Chief Marketing Officer

Franklin Templeton



Led by:

David Master

Former Chief Marketing Officer

Janus Henderson Investors



5:35 PM

END OF DAY ONE SUMMARY & CLOSING REMARKS

5:45 PM

EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC & NETWORKING



DAY TWO REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

7:30 AM

LEADERS' CIRCLE (C-LEVEL INVITATION-ONLY SESSION)

8:00 AM

Reflecting on 2024 and Setting Strategic Priorities to Stay Ahead of the Evolving Technological Landscape

Don't miss this exclusive session designed for C-level financial services leaders. Bringing together 25 senior marketing and digital executives to drive organizational success and business impact in 2025. Take away specific solutions to:

- Identify the impact of key trends on fellow financial services CMOs and how that will shape their strategy going forward.
- Plan your next steps for delivering exceptional growth and customer experiences.
- Benchmark investment priorities and success metrics.

Achieve a winning vision and actionable strategies to ensure your teams excel, guided by industry-leading experts.

DAY TWO OPENING REMARKS FROM THE CHAIRPERSON

8:50 AM

Tim Hines

Fractional Chief Marketing Officer

Marketing Starter Group



CASE STUDY: PERSONALIZED ENGAGEMENT STRATEGY

9:00 AM

Creating a Multi-Channel, Personalized Client Engagement Ecosystem to Grow and Retain Your Client Base

Delve into a step-by-step roadmap and reflections on mobilizing a large enterprise to enhance strategy and martech capabilities. Transitioning from single-channel, one-time push channel engagement to a culture of personalized, data-driven, multi-channel engagement, maximizing client development and scale. Create a plan that you can apply to your business to lead change and achieve industry-leading results through practical tips on how to:

- Analyze end-to-end client journeys and identify friction points that are optimal candidates for personalization.
- Identify client insights that can be used at scale to drive personalized engagement.
- Build tests that solve learning agendas as well as decision frameworks driving organizational change.

Build an effective personalization strategy and a team to drive business results.

Julienne Redmond

Vice President

Fidelity Investments



9:30 AM

INDUSTRY EXPERT PRESENTATION: CUSTOMER TRUST AND LOYALTY

How Should You Approach Customer Trust to Build Deeper Relationships in a Cookie-Less World?

Build customer trust through robust first- and zero-party data strategies, fostering a mutually beneficial value exchange between your brand and customers. Create a roadmap to:

- Cultivate relationships with customers centered around data and value exchange.
- Consolidate first-party data to create a comprehensive understanding of your customers and effectively target the right audience.
- Design meaningful personalized interactions to improve customer engagement and loyalty.

Optimize your data strategy to enhance customer trust and nurture long-term loyalty.

10:00 AM

PANEL DISCUSSION: AI-DRIVEN TRANSFORMATION

Driving Your Organization Towards Rapid and Responsible Exploration of AI Capabilities for Process Optimization, Scaling, and Customer Journey Improvements

Discover how early adopters discern the most impactful business use cases, separating reality from hype and swiftly involving relevant internal stakeholders. Adopt best practices to:

- Navigate a use case from pilot setup to execution stage.
- Address privacy and bias concerns within internal teams and external customers.
- Identify opportunities to upskill your teams with AI-powered tools.

Transform your AI capabilities to unlock new levels of efficiency, innovation, and competitive advantage in your marketing strategies.

John Renz

Vice President, Head of Creative, US Businesses

Prudential Financial



Matt Lesle

Managing Director, Global Head of Digital Product

J.P. Morgan Asset Management



Candis Curd

Director of Digital Strategy & Transformation, GenAI & Emerging Technologies

Unum



Katherine Lucas

Head of Marketing & Commercialization

State Street



REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

10:40 AM

ROUNDTABLE DISCUSSIONS

11:10 AM

Break into smaller groups of approximately 10 industry peers to work through a series of questions and challenges to share knowledge on a particular topic that is most critical to your role and business.

A: WEBSITE AI BOTS: Effectively Integrating Website Chatbots to Drive Conversion, Customer Engagement, and Brand Experience.

Led by:

Jeff Gardner, Executive Vice President, Sales & Marketing, **Mutual of Enumclaw**



B: BITE-SIZED VS LONG-FORM CONTENT: Boosting Engagement Through Short Video Formats and Tying Vanity Metrics into Growth and Business Impact.

Led by:

Amber Wuollet, Director of Product Marketing, **Curi**



C: BEST TIPS ON META AND LINKEDIN MARKETING: What Can the Financial Services World Learn from Influencers?

Led by:

Danielle Darling, Financial Advisor, **LPL Financial**



D: EMAIL MARKETING BEST PRACTICE: Innovating a Traditional Channel to Improve Engagement and Drive Conversion.

Led by:

Kaitlyn Crowder, Vice President, Marketing Director, **North Avenue Capital**



E: DOING MORE WITH LESS: Leveraging Existing Resources to Attract More Customers Today.

Led by:

Rachel Bourne, Head of Bank Partnerships, Head of Bank Partnerships, **MaxMyInterest**



F: RISK AND COMPLIANCE IN AI IMPLEMENTATION: When And How Should You Talk to Compliance and Governance Teams to Get Your AI Use Cases Off the Ground?

G: UNLOCKING MARKETING EXCELLENCE: Building and Leading an Empowered Team for Success.

Led by:

Mark Reese, Marketing Director, **Tri-Merit**



H: CUSTOMER ONBOARDING AND ACTIVATION: Tips for the First 90 Days to Maximize Loyalty and Strengthen Relationships.



12:00 PM

TRACK A: DIGITAL INNOVATION & GROWTH

PANEL DISCUSSION: FINANCIAL SERVICES FOR THE NEXT GENERATION

Redefining Financial Services to Resonate with a Younger Consumer Demographic

- Connect with the Gen-Z generation.
- Balance tradition and innovation.
- Refine your value proposition based on the younger generation's values.

Judy Edelson
Chief Marketing Officer
Apple Bank



Amber Wuollet
Director of Product Marketing
Curi



Jennifer Taylor
Head of Digital, Commercial Bank,
Axos Bank



TRACK B: CONTENT STRATEGY

PANEL DISCUSSION: VIDEO CONTENT IN FINANCE

Best Ways to Leverage Video in 2025 to Boost Customer Engagement

- Scale video capabilities through partnerships and video-generating technologies.
- Identify the most impactful metrics and measurements to assess success.
- Interpret data to identify patterns, compare channels, and maximize engagement.

Allison Knightly
Marketing Director,
Head of US Paid Media
Columbia Threadneedle Investments



Kaitlyn Crowder
Vice President, Marketing Director
North Avenue Capital



TRACK C: INTERACTIVE SESSION

WORKSHOP 4: USING DATA TO SHRINK THE AUDIENCE BULLSEYE

Using Company, Customer, Channel, and Contextual Data to Multiply the Impact of Marketing

Improve the business impact of paid, owned, earned, and shared media.

Allocate more resources to relevant and in-market prospects.

Leverage the signal value of media response in owned marketing and sales channels.

Improve the financial impact of your marketing investments by a third or more by using customer engagement data to better plan, allocate, and optimize your media.

Led by:
Stephen Diorio, Diorio, Executive Director,
Revenue Enablement Institute



12:30 PM

TRACK A: DIGITAL INNOVATION & GROWTH

INDUSTRY EXPERT PRESENTATION: MARKETING INSIGHT AND ANALYTICS

Increase the Insight Maturity of Your Organization to Measure Success, Drive Growth, and Maximize Customer Experience

- Consolidate fragmented data across your marketing technology stack.
- Bridge the data and analytics skills gap in your organization using powerful insight technologies.
- Use predictive models to simulate and measure the impact of your marketing and advertising campaigns.

TRACK B: CONTENT STRATEGY

INDUSTRY EXPERT PRESENTATION: CONTENT STRATEGY OPTIMIZATION

Create Content that Captivates Audiences, Builds Trust, and Drives Conversion Within a Highly Regulated Industry

- Craft content tailored to every stage of the customer journey.
- Measure content success across different stages of the customer journey.
- Embrace cutting-edge AI content creation tools to scale your content capabilities.

NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

1:00 PM

2:00 PM

TRACK A CONTINUED: DIGITAL INNOVATION & GROWTH

CASE STUDY: GROWTH THROUGH PARTNERSHIPS

Unlocking New Avenues for Business Growth and Enhancing Customer Value by Leveraging Strategic Fintech Partnerships

- Identify and evaluate a beneficial partnership.
- Develop collaborative strategies that integrate fintech solutions to enhance your product offerings and customer experience.
- Navigate regulatory considerations and manage risks associated with fintech partnerships to ensure compliance and trust.

Dwight Flenniken

Chief Marketing Officer & Executive Vice President

Sunwest Bank



TRACK B CONTINUED: CONTENT STRATEGY

CASE STUDY: PODCASTS AS AN EFFECTIVE MARKETING TOOL

Launching a Podcast in a World Where Everyone Has a Podcast

- Overcome the most common technical and business challenges.
- Navigate any budget.
- Define success measures.

Lara Coleman

Executive Director, Advertising & Content Marketing

FS Investments



2:30 PM

TRACK A: DIGITAL INNOVATION & GROWTH

INDUSTRY EXPERT PRESENTATION: AI-ENABLED PERSONALIZATION Driving Marketing Effectiveness, Customer Value, and Loyalty with Personalized Communication at Scale

- Find new ways to use your existing data to reach your customers at the right place and at the right time.
- Build towards a centralized, unified view of data.
- Leverage the context of each customer interaction to drive customer experience enhancement.

TRACK B: CONTENT STRATEGY

INDUSTRY EXPERT PRESENTATION: LINKEDIN AS A POWERFUL CONTENT PLATFORM

The Most Effective Ways to Use LinkedIn as a Tool for Lead Generation and Customer Engagement

- Analyze high-performing content types on LinkedIn.
- Identify ultimate goals and tracking mechanisms.
- Engage employees and independent advisors to embrace LinkedIn.

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

3:00 PM

FIRESIDE CHAT: GROWTH LEADERSHIP

Raising The Profile of Your Team as a Revenue-Generating Center

Elevate your team's role as a key driver of revenue growth. This session will provide you with actionable strategies on how to:

- Directly connect your team's role, remit and results to their impact on the revenues, profits, and the value of the customer relationship.
- Leverage technology, data, and AI to inform and enhance the quality, effectiveness, consistency, and compliance of your entire go-to market team.
- Work across product, marketing, sales, and response to improve the workflow, productivity, knowledge sharing, responsiveness and the customer experience of the revenue team.

Transform your marketing team into a recognized revenue-generating powerhouse within your organization.

Kristen Carloni

Global Head of Business Proposal Team, Aladdin

BlackRock

Led by:

Stephen Diorio

Managing Director

Revenue Enablement Institute

Aladdin
by BlackRock

Revenue Enablement
Institute



CLOSING KEYNOTE PRESENTATION: CONTENT STRATEGY AND STORYTELLING

4:10 PM

Pushing the Boundaries of Your Brand to Increase Content Effectiveness for Modern Audiences

Elevate your content strategy by mastering the art of storytelling and adapting to the needs of modern audiences. In this presentation, you will draw from Mark's extensive experience bringing brands into their digital future and how the knowledge learnt can be effectively applied to the financial services industry, based on examples from Harding Loevner. Walk away with a blueprint on how to:

- Match your story to the most effective content form and platform, ensuring it resonates with your target audience.
- Maintain narrative consistency while telling the same story across multiple platforms.
- Produce timely and relevant content that aligns with how audiences consume information today.

Transform your content strategy to captivate modern audiences and drive meaningful engagement through powerful storytelling.

Mark McClusky
Head of Content
Harding Loevner



CLOSING REMARKS & END OF SUMMIT

4:40 PM

Tim Hines
Fractional Chief Marketing Officer
Marketing Starter Group



Taya Prokopenko
Head of Content, Digital Marketing for Financial Services
Strategy Institute



Sponsorship Opportunities

Support North America's largest and scaling financial brands on their marketing transformation journey with your **technology solutions, strategic expertise and implementation experience.**

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Depending on your needs, the sponsorship packages can include:

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What our Sponsors have to say:

"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 – Past Sponsor

For more information to discuss the different ways to get involved for your brand, please contact:



Darren Haughian
Sponsorship Director
Strategy Institute

Call: 1-866-298-9343 x 276

Email: darren@strategyinstitute.com

Other upcoming events in the DMFS series:

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Digital Marketing for
Financial Services Summit **MIDWEST**

Fall 2024

9th Annual
Digital Marketing for
Financial Services Summit **WEST**

Spring 2025

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Spring 2025



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\$1,495 USD

Regular Price

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VIRTUAL EXPO HALL:

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

SPEAKER PRESENTATIONS:

Take away PowerPoints and white papers addressing your biggest challenges

ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event

Super Early Bird
Virtual (Aug 23, 2024)

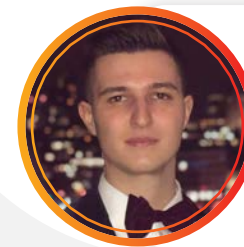
\$995 USD

Regular Price

\$1,495 USD

GROUP RATES

To check if you are eligible for a group rate, please contact:



Sam Caskey

Delegate Relationships Manager - DMFS

Strategy Institute

sam.caskey@strategyinstitute.com

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