



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



Henry Detering
Chief Marketing Officer
Neuberger Berman



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



customer@strategyinstitute.com



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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.

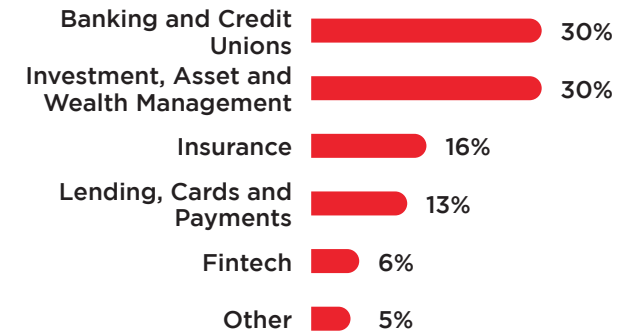


Who Attends

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:

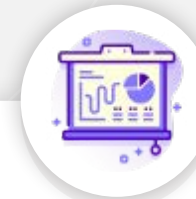
Customer/Client
Experience, Customer
Insight & Analytics,
Customer Journey



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



customer@strategyinstitute.com



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Chief Marketing Officer
Northwestern Mutual



Henry Detering
Chief Marketing Officer
Neuberger Berman



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



Judy Edelson
Chief Marketing Officer
Apple Bank



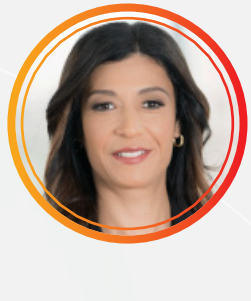
Lisa Zakrzewski
Chief Marketing Officer
Leverage Retirement



Andy O'Rourke
Chief Marketing Officer
Direxion



Dwight Flenniken
Chief Marketing Officer,
Executive Vice President
Sunwest Bank



Riham El-Lakany
Former Chief Marketing
Officer at
**BJC Healthcare,
Freddie Mac and Marsh**



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



Rejeesh Ramachandran
SVP, Head of Marketing
Transformation,
Technology, Analytics &
Personalization
TD Bank



Jeff Wilson
Senior Vice President,
Head of Marketing –
Business, Corporate &
Investment Banking
Citizens Bank



Martiña Gago
Senior Vice President,
Head of Content
Strategy, Personal
Banking & Wealth
Management
Citi



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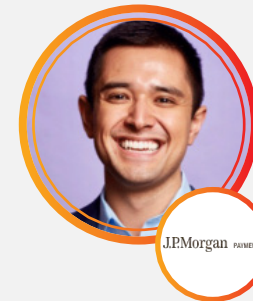
Mitch Rose
Executive Director,
Digital Strategy - Content
J.P. Morgan

J.P.Morgan



Jill Perlberg
Vice President, Content &
Client Marketing
Northwestern Mutual

Northwestern Mutual



Abel Flint
Vice President, Brand
Marketing Lead - J.P.
Morgan Payments
JPMorgan Chase & Co

J.P.Morgan PAYMENTS



Cameron Hood
Vice President, Head
of Editorial – Payments
Marketing
JPMorgan Chase & Co

J.P.Morgan PAYMENTS



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

T.RowePrice



Jacquelyn Reardon
Vice President,
Head of US Marketing
Franklin Templeton

FRANKLIN TEMPLETON



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

J.P.Morgan ASSET MANAGEMENT



Sara Rosenbaum
Assistant Vice President,
US Brand, Creative &
North American
Citizenship Marketing
TD Bank

TD Bank



Victoriya Smith
Senior Vice President,
Senior Compliance
Officer, ICRM
Citi

citi



Jacob Holtgrewe
Global Head of Digital
Marketing & Media
TIAA

TIAA



Emily Childers
Head of Growth
Marketing
Credit Karma

creditkarma



Jeff Cohan
Senior Vice President,
Digital Marketing
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HARTFORD FUNDS



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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



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



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



Amelia Stephens
Director, US Retail
Marketing
AllianceBernstein



Keith Gerr
Director, Digital Channel
Strategy
Mutual of Enumclaw



Emily Stewart
Director, Digital
Marketing & Analytics,
Growth Strategies
Meritrust
Credit Union



Mark Reese
Marketing Director
Tri-Merit



Amber Wuollet
Director of Product
Marketing
Curi



Kristen Carloni
Global Head of Business
Proposal Team, Aladdin
BlackRock



Katherine Lucas
Head of Marketing &
Commercialization
State Street



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Head of Marketing
& Communications,
Americas
AXA IM



Jeff Jones
Head of Digital
Marketing
AXA XL



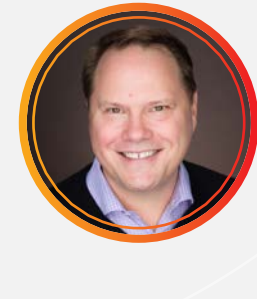
Mark McClusky
Head of Content
Harding Loevner



Jennifer Taylor
Head of Digital,
Commercial Bank
Axos Bank



Rachel Bourne
Head of Bank
Partnerships
MaxMyInterest



David Blackburn
Former Executive
Director, Head of Digital
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ProShares



Danielle Darling
Financial Advisor
LPL Financial



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Stephen Diorio
Managing Director
**Revenue Enablement
Institute**



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



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

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Industry Expert Speakers



Diego Lomanto
Chief Marketing Officer
Writer

WRITER



Callan Young
Chief Marketing Officer
ON24

ON24



Maria Pacheco
Chief Executive Officer
Storyful

storyful.



Klas Hesselman
CEO & Founder
Flow Networks

flow



Nasser Sahlool
Senior Vice President,
Client Strategy
DAC

DAC



Michael Smith
Senior Vice President,
Financial Services
Epsilon

Epsilon



Hastu Kshitij
Vice President of Growth
- North America
Moengage

moengage



Wayne Cichanski
Vice President, Search &
Site Experience
iQuanti

iQUANTI



Samantha Goble
Vice President, Digital
XCentium

XCENTIUM



Carolyn Martin Emond
Vice President,
Client Solutions
Kepler Group

KEPLER



Jourdan Gariepy
Head of Optimization,
Innovation & Strategic
Partnerships
Kepler Group

KEPLER



Lucas Rabinowitz
Associate Vice President,
Growth
CHEQ

DEMANDBASE



Industry Expert Speakers



Gagan Mehta
Sales Manager,
Enterprise Sales
Demandbase

DEMANDBASE



Eric Feige
Managing Director,
Strategy
VShift

VSHIFT



Adit Hoenigmann
General Manager,
Enterprise Americas
Kaltura

kaltura



Tom Fricano
Executive Practice
Director of Strategic
Consulting
PossibleNow

POSSIBLENOW
Cloud, Network, Insights, Compliance



Shannon Sloan
Director, New Business
Development
Rich Media

richmedia



Jonathan Corley
Director of Experience
Strategy, Customer
Transformation
Sitecore

SITECORE



Samantha Mansfield
Principal of User Design
& Strategy
Chartis

chartis



Erika Whitestone
Financial Services Lead
**Dynamic Yield by
Mastercard**

Janus Henderson
INVESTORS



Robert Kranz
Vice President of
Solutions
Terminus

terminus

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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



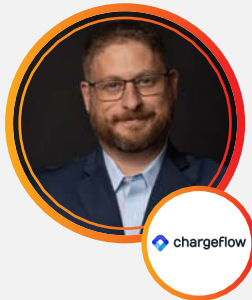
Erin Wilson
Vice President,
Marketing
HomeEquity Bank



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



REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

7:30 AM

WELCOME FROM STRATEGY INSTITUTE

8:30 AM

Taya Prokopenko

Head of Content, Digital Marketing for Financial Services,

Strategy Institute



OPENING REMARKS FROM THE CHAIRPERSON

8:45 AM

Stephen Diorio

Executive Director

Revenue Enablement Institute



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 bespoke organizational structures that reflect your marketing strategy and business model.
- Implementing digital and measurement initiatives in the face of imperfect enterprise data.
- Bringing together cross-functional problem-solving and collaboration.

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.

Andy O'Rourke

Chief Marketing Officer

Direxion



Jeff Cohan

Senior Vice President, Digital Marketing

Hartford Funds



Emily Childers

Head of Growth Marketing

Credit Karma



Led by:

Stephen Diorio

Executive Director

Revenue Enablement Institute



SPEED NETWORKING

10:15 AM

INDUSTRY EXPERT PRESENTATION: PERSONALIZED VIDEO ENGAGEMENT

10:30 AM

Connecting with Your Customers on Their Journey from Acquisition, Conversion, Retention to Loyalty

As financial customers become more savvy, generic hypotheticals no longer speak to them. Capture your audience's attention at every step of their customer journey through personalized messaging. This session will provide guidance on how to:

- Connect with your customers on an emotional level to allow you to build relationships and goodwill.
- Capture and hold the attention of your customers throughout their decision-making process.
- Signal importance, helping to foster loyalty and word-of-mouth marketing.

Take your digital marketing to the next level and connect with your customers in a more genuine way by offering personalized videos.

Shannon Sloan
Director, New Business Development
Rich Media



11:00 AM

REFRESHMENTS BREAK & EXHIBIT OR 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!



11:30 AM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

Led by:
David Master
Former Chief Marketing Officer
Janus Henderson Investors

 Janus Henderson
INVESTORS

INDUSTRY EXPERT PRESENTATION: CONSENT & PREFERENCE DATA

Building Trust in a Privacy-Conscious Era

- **Unlock Seamless Personalization:** Utilize customer-provided insights to enable a harmonized omnichannel experience, ensuring every interaction is tailored, relevant, and aligned with individual customer preferences.
- **Build Trust Through Transparency:** Leverage consent and preference data to foster customer loyalty and trust, creating a privacy-first approach that resonates with today's cautious consumers.
- **Ensure Regulatory Compliance:** Discover strategies for maintaining compliance with evolving privacy laws while delivering personalized customer experiences.

Tom Fricano
Executive Practice Director
of Strategic Consulting
PossibleNow

 POSSIBLENOW™
Consent, Preferences, Insights, Compliance

TRACK B: THE FUTURE OF BRAND, MEDIA & CREATIVE

Led by:
Stephen Diorio
Executive Director
Revenue Enablement Institute

 Revenue Enablement
Institute

INDUSTRY EXPERT PRESENTATION: AI- POWERED SEARCH

Adapting for Greater Brand Discovery in an Evolving Landscape

- Adapt to algorithm changes
- Optimize your search presence
- Leverage AI-driven insights

*Enhance your brand's visibility and discovery
in an increasingly competitive search
environment.*

Nasser Sahlool
Senior Vice President,
Client Strategy
DAC

 DAC

TRACK C: WORKSHOPS

11:30 AM - 12:15 AM

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

 FIRST
COMMAND
Get Squared Away



12:00 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PANEL DISCUSSION: FINANCIAL SERVICES DIGITAL TRANSFORMATION

Leveraging Account-Based Strategies & Demandbase

- Revealing buyer interests and needs
- Prioritizing and engaging key accounts
- Adopting new technologies to stay ahead of competition

Jeff Wilson

Senior Vice President, Head of Marketing – Business, Corporate & Investment Banking
Citizens Bank



Amelia Stephens

Director, US Retail Marketing
AllianceBernstein



Will Obre

Head of Marketing & Communications, Americas
AXA IM



Jeff Jones

Head of Digital Marketing
AXA XL



Led by:

Eric Feige

Managing Director, Strategy
VShift



Gagan Mehta

Sales Manager, Enterprise Sales
Demandbase



TRACK B: THE FUTURE OF BRAND, SOCIAL & SEARCH

PRESENTATION: BRAND AND PRODUCT STORYTELLING IN THE AGE OF GENAI

Optimizing the Role of Generative AI In the Creative Process

Bolster productivity, creativity, and profitability with Generative AI tools. You'll walk away with practical tips on how to:

- 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

J.P.Morgan



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 BRAND, MEDIA & CREATIVE

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.

Emily Childers,
Head of Growth Marketing
Credit Karma



Led by:
Stephen Diorio
Executive Director
Revenue Enablement Institute



TRACK C: WORKSHOPS

12:15 AM - 1 PM

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

TRACK B CONTINUED: THE FUTURE OF
BRAND, MEDIA & CREATIVE

TRACK C CONTINUED:
WORKSHOPS



2:00 PM

TRACK A CONTINUED: MARKETING OPERATIONS & DIGITAL ENABLEMENT

PANEL DISCUSSION: FIRST-PARTY DATA

Setting Up for Hyper-Personalization Through First-Party Data Strategies

- 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



Emily Stewart

Director, Digital Marketing & Analytics, Growth Strategies

Meritrust Credit Union



Led by:

David Master

Former Chief Marketing Officer

Janus Henderson Investors



TRACK B CONTINUED: THE FUTURE OF BRAND, MEDIA & CREATIVE

PANEL DISCUSSION: THE NEW REALITY OF CREATIVE AND MEDIA

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

Abel Flint

Vice President,
Brand Marketing Lead
- J.P. Morgan Payments

JPMorgan Chase & Co



Sara Rosenbaum

Assistant Vice President,
US Brand, Creative & North
American Citizenship Marketing

TD Bank



Martiña Gago

Senior Vice President, Head of
Content Strategy, Personal
Banking & Wealth Management

Citi



Mark McClusky

Head of Content

Harding Loevner



Maria Pacheco

Chief Executive Officer

Storyful



Led by:

Stephen Diorio

Executive Director

Revenue Enablement Institute



TRACK C CONTINUED: WORKSHOPS

2:00 PM - 2:45 PM

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 omnichannel 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.

Delve into the art of crafting compelling narratives that seamlessly guide customers through a series of micro-experiences across their journey with your brand.

Alex Hachey

Vice President, Director of
User Experience Design

T. Rowe Price



2:45 PM

TRACK A CONTINUED: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PRESENTATION: THE FAKE WEB

Fighting Fake Traffic in Financial Brands' Marketing Funnels

Delve into the proliferation of the fake web and how its associated challenges have impacted the financial services industry. Discover actionable insights and best practices to:

- Assess how fake traffic disrupts customer acquisition and promotional efforts.
- Identify fake traffic in your marketing data.
- Protect your campaigns, website, and funnel from bots, fake users, and bad actors.

Lucas Rabinowitz
Associate Vice President, Growth
CHEQ



TRACK B CONTINUED: THE FUTURE OF BRAND, MEDIA & CREATIVE

INDUSTRY EXPERT PRESENTATION: CONTENT STRATEGY 2.0

Unlocking The Full Potential of Your Content Strategy

Elevate your brand's visibility and effectively engage with your audience in a rapidly evolving digital landscape. This session will share innovative approaches on how to:

- Uncover hidden opportunities within your existing content strategy.
- Tap into new channels and techniques to amplify your reach.
- Adapt to evolving content consumption trends across platforms and devices.

Wayne Cichanski
Vice President, Search &
Site Experience
iQuanti



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

3:15 PM



3:45 PM

EVALUATIONS & MARKET POLL

EVALUATIONS & MARKET POLL

3:50 PM

TRACK A CONTINUED: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PRESENTATION: PERSONALIZATION AT SCALE

Delivering Personalized Experiences to Accelerate Financial Services Customer Engagement

- Adapt to evolving customer content preferences and leverage composable marketing technology to meet your customers' needs.
- Streamline content operations by centralizing assets and data, and create, test, and publish personalized content at scale.
- Focus on metrics that matter and scale personalization efforts.

Jonathan Corley

Director of Experience Strategy,
Customer Transformation

Sitecore



TRACK B CONTINUED: THE FUTURE OF BRAND, MEDIA & CREATIVE

INDUSTRY EXPERT PRESENTATION: ENGAGEMENT IS THE CHALLENGE, GROWTH IS THE GOAL

Delivering Next Generation Lifecycle Management

- Engage Customers Across the Lifecycle: Use payment interactions as touchpoints, leveraging data to deliver personalized, relevant experiences.
- Activate Real-Time Data to Meet Customer Needs: Tap into your data lakes to stay responsive to evolving preferences, surpassing traditional "Batch and blast" approaches.
- Differentiate Your Brand in a Saturated Market: Surprise and delight customers, reinforce your value, and embed your brand into their lifestyle and ecosystem.
- Create a Consumer-Centric Revenue Stream: Build a sustainable, high-impact channel integrated into daily life to drive engagement, retention, and growth.

Klas Hesselman

CEO & Founder

Flow Networks



4:20 PM

INDUSTRY EXPERT PRESENTATION: PUTTING THE CUSTOMER AT THE CENTER OF EVERYTHING YOU DO

Executing On Your Vision for Personalization, Overcoming Challenges and Driving Positive Outcomes

In today's fast-paced digital world, delivering personalized experiences isn't just a competitive advantage—it's an expectation. Walk away with practical tips on how to:

- Discover how data, technology, and thoughtful execution come together to create legendary customer experiences at every touchpoint.
- Utilize proven methods to inform and scale your personalization strategy to drive real business impact.
- Optimize your resources and turn insights into action while maintaining agility in a rapidly evolving landscape.

Unlock the tools and strategies to create personalized customer experiences that drive engagement, loyalty, and measurable business growth.

Rejeesh Ramachandran

Senior Vice President, Head of Marketing Transformation, Technology, Analytics & Personalization

TD Bank



Michael Smith

Senior Vice President, Financial Services

Epsilon



ASSET MANAGEMENT SPOTLIGHT PANEL DISCUSSION: IS CONTENT KING?

4:45 PM

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.

Henry Detering

Chief Marketing Officer

Neuberger Berman



Walter Agumbi

Managing Director, Global Head of Content & Product Marketing

Goldman Sachs Asset Management



Jacquelyn Reardon

Vice President, Head of US Marketing

Franklin Templeton



Led by:

David Master

Former Chief Marketing Officer

Janus Henderson Investors



END OF DAY ONE SUMMARY & CLOSING REMARKS

5:30 PM

EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC & NETWORKING

5:35 PM



DAY TWO REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

8:00 AM

DAY TWO OPENING REMARKS FROM THE CHAIRPERSON

8:50 AM

Tim Hines

Fractional Chief Marketing Officer

Marketing Starter Group



KEYNOTE FIRESIDE CHAT: THE FUTURE OF BRAND AND MEDIA

9:00 AM

Orchestrating Paid, Owned, Earned and Shared Media to Maximize Business Impact

Break down silos across your marketing and agency teams to multiply the impact of your spend and create a cohesive brand presence that cuts through the noise. Take away strategies to:

- Connect paid, owned, earned and shared media to maximize your business impact.
- Align content strategy to maximize media impact and personalize messages to buyer persona.
- Balance programs and investment in B2B2C model to build brand, demand and customer expansion.
- Meet the changing media, channel and consumption habits of a wide array of cohorts.

Harness the full potential of media through an integrated and omnichannel media strategy that builds the brand, drives revenue, and multiplies business impact.

Jacob Holtgrewe

Global Head of Digital Marketing & Media

TIAA



Led by:

Stephen Diorio

Executive Director

Revenue Enablement Institute



9:30 AM

INDUSTRY EXPERT FIRESIDE CHAT: GENERATIVE AI IN FINANCIAL SERVICES

Breaking the ROI Barrier With Generative AI in Financial Services

Join Writer CMO Diego Lomanto in conversation with Jacquelyn Reardon, Head of US Marketing at global asset management leader Franklin Templeton. This fireside chat will explore high-impact use cases in financial services, and how to sequence work for maximum ROI, focusing on specific deliverables, including:

- Streamlined creation of marketing commentary and client deliverables.
- Consistent, style guide-compliant messaging across all communications.
- Optimization across a complex array of paid search campaigns.
- Content translations across multiple global teams.

Learn how to break through the ROI ceiling of most generative AI projects.

Jacquelyn Reardon

Vice President, Head of US Marketing

Franklin Templeton



Led by:

Diego Lomanto

Chief Marketing Officer

Writer

WRITER



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



Samantha Mansfield

Principal of User Design & Strategy

Chartis



Led by:

Tim Hines

Fractional Chief Marketing Officer

Marketing Starter Group



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

10:45 AM



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ROUNDTABLE DISCUSSIONS

11:15 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: **Keith Gerr**, Director, Digital Channel Strategy, **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: DOING MORE WITH LESS: Leveraging Existing Resources to Attract More Customers Today.

Led by: **Rachel Bourne**, 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?

Led by: **Victoriya Smith**, Senior Vice President, Senior Compliance Officer, ICRM, **Citi**



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

Led by: **Mark Reese**, Marketing Director, **Tri-Merit**



H: CREATING B2B CONTENT THAT RIVALS NETFLIX: Strategies to Dominate the Cluttered Digital Landscape.

Led by: **Abel Flint**, Vice President, Brand Marketing Lead - J.P. Morgan Payments, **JPMorgan Chase & Co**

Cameron Hood, Vice President, Head of Editorial – Payments Marketing, **JPMorgan Chase & Co**



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

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.

Riham El-Lakany

Former Chief Marketing Officer at

BJC Healthcare, Freddie Mac and Marsh

This is an invitation-only closed-door session. Please enquire for access to this session at taya@strategyinstitute.com.



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12:00 PM

TRACK A: DIGITAL INNOVATION & GROWTH

Led by:
Tim Hines
Fractional Chief Marketing Officer
Marketing Starter Group



PANEL DISCUSSION: FINANCIAL SERVICES FOR THE NEXT GENERATION

Redefining Financial Services to Resonate with the Future 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



Hastu Kshitij
Vice President of Growth -
North America,
Moengage



TRACK B: CONTENT STRATEGY

Led by:
David Master
Former Chief Marketing Officer
Janus Henderson Investors



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



Callan Young
Chief Marketing Officer
ON24



TRACK C: INTERACTIVE SESSION

12:00 PM - 12:45 PM

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.

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



Robert Kranz,
Vice President of Solutions,
Terminus



12:40 PM

TRACK A: DIGITAL INNOVATION & GROWTH

INDUSTRY EXPERT PRESENTATION: IMPLEMENTING PERSONALIZATION AT SCALE

Simplifying the Path to Personalization in Banking

- Identify the four main barriers to personalization and the simple strategies to break through them.
- Implement personalization initiatives without regulatory concerns or complex technology integrations.
- Enhance every customer interaction, fostering loyalty and gaining a competitive advantage through increased wallet share.

Erika Whitestone
Financial Services Lead
Dynamic Yield by Mastercard



TRACK B: CONTENT STRATEGY

INDUSTRY EXPERT PRESENTATION: THE EVOLVING B2B CONSUMER

Revitalizing Digital Marketing Strategies for Financial Services Brands

- The Shift in Consumer Expectations: Understanding the importance of personalized, customer-centered advertising for B2B buyers, and strategies leveraging everything from Amazon's video platforms to social platforms.
- Gen Z's Impact on Financial Marketing: How brands can appeal to tech-savvy, values-driven Gen Z decision-makers through video-first approaches and social authenticity.
- Navigating Data and Privacy in a Cookieless Future: Effective methods for financial services brands to balance personalization with compliance, using first-party data and secure data clean rooms.

Carolyn Martin Emond
Vice President, Client Solutions
Kepler Group

Jourdan Gariepy
Head of Optimization, Innovation &
Strategic Partnerships
Kepler Group



NETWORKING LUNCH

1:10 PM

EXHIBITOR LOUNGE VISITS & PRIZE DRAW WINNER ANNOUNCEMENT

2:00 PM



CASE STUDY: PODCASTS AS AN EFFECTIVE MARKETING TOOL

2:15 AM

Launching a Podcast in a World Where Everyone Has a Podcast

Grow your brand awareness, educate your customer base, and reach a new audience by launching your own podcast. You will walk away with first-hand practical tips from the FS Investments podcast journey on how to:

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

Stand out in a saturated financial market by facilitating valuable conversations and enabling sales and business development teams.

Lara Coleman

Executive Director, Advertising & Content Marketing

FS Investments



INDUSTRY EXPERT PRESENTATION: VIDEO & GENAI

2:45 AM

Scaling Personalization to Drive Customer Growth

Personalized, engaging digital experiences have become critical to understanding your customers and ultimately driving growth. But how can you meet your diverse customers' needs, on multiple channels and at scale, while ensuring compliance and fostering loyalty? Join us to gain actionable insights into creating connections and future-proofing your digital marketing efforts in financial services by:

- Personalizing digital experiences to connect with audiences and build long-lasting relationships.
- Creating, repurposing and personalizing video, webinars, virtual and hybrid events, and podcasts at scale with a built-in AI-infused intelligent content lab.
- Engaging audiences with interactive, real-time AI-assisted engagement tools – and leveraging that precious 1st-party engagement data to optimize event and content strategies and boost ROI.

Create long-lasting connections with future-proof digital marketing experiences that boost reach, engagement, 1st party data and ROI.

Adit Hoenigmann

General Manager, Enterprise Americas

Kaltura



INDUSTRY EXPERT PRESENTATION: ACCELERATE YOUR TIME TO VALUE WITH COMPOSABLE MARTECH

3:15 AM

Getting A Head Start on Your Digital Transformation

In today's rapidly evolving digital landscape, embracing composable MarTech is key to staying ahead. Join us for a session where we'll dive into how you can accelerate your time to value and get a head start on your digital transformation journey. You'll walk away with tips on how to:

- Lower your TCO by paying only for what you need, avoiding unnecessary expenses on features or capabilities that aren't utilized.
- Accelerate your speed to market by gaining agility and flexibility to quickly adapt to market changes and customer needs.
- Increase efficiency by leveraging pre-built templates and modules that streamline your process.
- Future-proof for integration with new technologies thanks to the modular nature of composable that ensures easier and more cost-effective updates.

Enhance your digital transformation journey, achieving faster time to value and position yourself for long-term success in the dynamic digital marketplace.

Samantha Goble

Vice President, Digital
XCentium

XCENTIUM

KEYNOTE FIRESIDE CHAT: GROWTH LEADERSHIP

3:45 AM

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

Aladdin
by BlackRock

Led by:

Stephen Diorio

Managing Director

Revenue Enablement Institute

Revenue Enablement
Institute



CLOSING REMARKS & END OF SUMMIT

4:15 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.**

Showcase your brand and thought-leadership at the flagship event of the largest and longest-serving portfolio of digital marketing for financial services Summits in North America for more than 14 years.

Depending on your needs, the sponsorship packages can include:

- ✓ Speaking opportunities to demonstrate your brand's expertise
- ✓ Closed-door curated sessions for a selected group of participants
- ✓ Exhibition booths to facilitate networking and product demos

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

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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 (Sep 27, 2024)

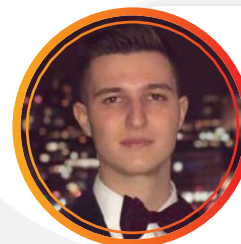
\$1,195 USD

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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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