

11th Annual

Digital Marketing *for* Financial Services

Virtual Summit **CANADA**

June 15-16, 2021 | Virtual Event

Past Attendee List





Join us at this exclusive event to generate **high-quality leads** that will drive your sales pipeline. Your attending field sales team will have one-on-one interactions with senior buyers who are expected to spend a collective \$100mm+ on digital marketing solutions over the next 12 months.

The **11th Annual Digital Marketing for Financial Services Summit** is hosted virtually on **June 15-16th, 2021**. It provides digital marketing executives with practical approaches to improving their marketing ROI and company bottom line with the very latest digital marketing techniques.

Agenda themes:

• Attribution + Analytics



• Customer Experience



• Improve ROI with Analytics



• Build Loyalty



• AI, Voice Search and Chatbots

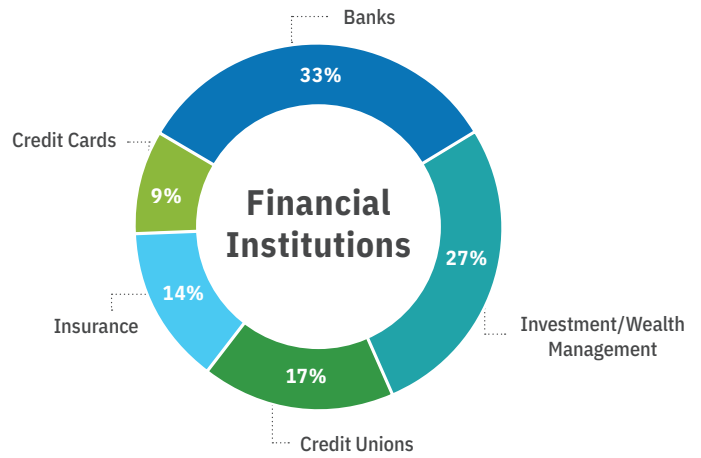
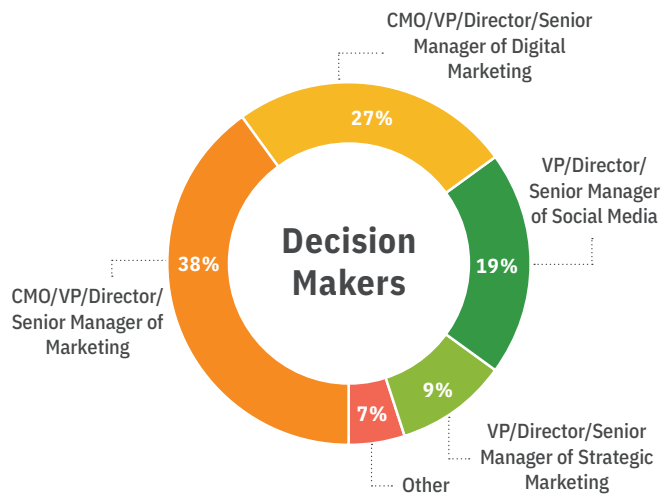


• Sentiment Analysis



Interested in generating leads from the buyers attending the event, to build your sales pipeline?
contact: darren@strategyinstitute.com • 1-866-298-9343 x 276

Who You Can Meet...



Interested in generating leads from the buyers attending the event, to build your sales pipeline?
 contact: darren@strategyinstitute.com • 1-866-298-9343 x 276

SAMPLE DMFS PAST ATTENDEES

DMFS Past Attendees

Presented by Strategy Institute

A - C

Associate Director, Marketing, **Advocis**
Associate Director, Marketing, **Nasdaq**
Associate Director, Strategic Marketing & Communications, **Vontobel Asset**
Associate, Marketing & Investor Relations, **Brompton Funds**
AVP Affiliate Marketing Officer, **Tompkins Financial Corporation**
AVP Channel Digital Strategy, **Invesco**
AVP Commercialisation, Marketing & Communications, **Banque Laurentienne**
AVP Communications & Member Relations, **Canadian Credit Union Association**
AVP Content Marketing & Communications, **MD Financial Management**
AVP Content Marketing & Retail Brand Experience, **TD Bank Group**
AVP Content Strategy, **Manulife Financial**
AVP Data Analytics, **HSBC Bank Canada**
AVP Digital Content Strategy, **Sun Life Financial**
AVP Digital Delivery, **Sun Life Financial**
AVP Digital Experience & Client Analytics, **Business Development Bank of Canada**
AVP Digital Marketing & Product Management, **Investors Group**
AVP Digital Marketing, **Bridgehouse Asset Managers**
AVP Digital Marketing, **Great-West Life**
AVP Digital Properties, **John Hancock Financial Services**
AVP Financial Solutions Marketing, **MD Physician Services**
AVP Global Digital Marketing, **CIBC**
AVP Head of Digital Marketing, Retail Banking & Wealth Management, **HSBC**
AVP Marketing & Brand, **Interac Association**
AVP Marketing Communications, **Standard Life**
AVP Marketing, **Horizons Exchange Traded Funds**
AVP Marketing, Retail Services, **Banque Laurentienne**
AVP Marketing & Client Engagement, **Sun Life Financial**
AVP Marketing & Communications, **B2B Bank**
AVP Marketing Development & Analytics, **Investors Group**
AVP Marketing, Everyday Banking & Digital Banking, **TD Wealth Private Investment Advice**
AVP Product Marketing, **Horizons Exchange Traded Funds**
AVP Sales Effectiveness & Training Retail Services, **Banque Laurentienne**
AVP Strategic Brand Operations, **The Sovereign General Insurance Company**
Brand Manager, **Canadian Western Bank**
Brand Manager, **Lambton Financial Credit Union**
Campaign Manager, Email Marketing, **Franklin Templeton Investments**
CEO & President, **Alterna Savings**
CEO & President, **Estonian Credit Union**
CEO, **Waypoint Insurance Services**
Chief Communication Officer & SVP Corporate Affairs, **AmTrust Financial Services**
Chief Customer Officer, **First Canadian Title**
Chief Digital Officer, **Royal & Sun Alliance**
CIO, **Canadian Scholarship Trust**
Client Marketing Manager, **Loyalty One**
CMO, **Fairstone Financial**
CMO, **FIRMA Foreign Exchange**

CMO, **GE Capital**
 CMO, **Mawer Investment Management**
 CMO, Personal & Commercial Banking & Wealth, **BMO Financial Group**
 CMO, **Xceed Financial Credit Union**
 CMO, **Zag Bank**
 Community Manager, Digital Marketing, **Mastercard**
 Content Marketing Manager, **The Sovereign General Insurance Company**
 COO of Direct Distribution, **Western Financial Group**
 COO, **AIMA Canada**
 Corporate VP Social Media, **New York Life Insurance**

D - G

Digital Communities Lead, Branding & Communication, **Manulife Financial**
 Digital Marketing Director, **ATB Financial**
 Digital Marketing Director, **New York Life**
 Digital Marketing Manager, **Excel Funds Management**
 Digital Marketing Manager, **Foresters Financial**
 Digital Marketing Manager, **GE Capital**
 Digital Marketing Manager, **Standard Life**
 Digital Marketing Specialist, **Ernst & Young**
 Digital Services Manager, **London Life Insurance Company**
 Digital Strategy Director, **Scotia iTrade**
 Director & Head of Digital, **New York Life**
 Director & Head of Marketing, Dynamic Funds, **Scotiabank Wealth Management**
 Director of Advertising, Media & Sponsorship, National Marketing, **Intact Insurance**
 Director of Brand Management, **Red River Mutual**
 Director of Customer Insights & Analytics, **Scotiabank**
 Director of Customer, **Mouvement Desjardins**
 Director of Customer Experience, Global Marketing, **Manulife Financial**
 Director of Digital Acquisition, Consumer Card Marketing, **American Express**
 Director of Digital Marketing, Retail Insurance, **Empire Life**
 Director of Digital, **Direct Marketing Association of Canada**
 Director of Marketing, **Allstate Insurance Company of Canada**
 Director of Marketing, **Canadian Automobile Association**
 Director of Marketing, **Desjardins General Insurance Group**
 Director of Marketing, **Heritage Education Funds**
 Director of Marketing, **Home Trust Company**
 Director of Marketing, **iFinance Canada**
 Director of Marketing, **LSM Insurance**
 Director of Marketing, **Northbridge Financial**
 Director of Marketing, **Pivotal Payments**
 Director of Marketing, **Rogers Bank**
 Director of Marketing, Canada, **Russell Investments**
 Director of Marketing & Communications, **BelairDirect**
 Director of Marketing & Communications, **ATB Corporate Financial Services**
 Director of Marketing, Strategy & Innovation, **BMO Financial Group**
 Director of Marketing, Ally Brand & Communications, **ResMor Trust Company**
 Director of Marketing & Advertising, **Gentera**
 Director of Marketing & Business Development **Ontario Teachers' Insurance Plan**

Director of Marketing Communications **AGF Management**
Director of Marketing Communications **Standard Life Investments**
Director of Marketing Communications, **President's Choice Financial**
Director of Marketing Strategy, **Moody's Analytics**
Director of Marketing, Customer Management & Digital Experience, **American Express**
Director of Media, **Bank of Montreal**
Director of Media/Agency Management, **RBC**
Director of Sales & Marketing, **Waypoint Insurance Services**
Director of Social Media, **AXA Investment Managers**
Director, B2B Marketing & Product Strategy, **American Express**
Director, Brand Marketing, **Dundee Wealth Management**
Director, Content & Shared Services, **Tangerine**
Director, Content Strategy, **Mackenzie Investments**
Director, Corporate Communications, **Investment Planning Counsel**
Director, CRM Channel Analytics, **Capital One**
Director, Customer Acquisition, **Capital One**
Director, Digital (Labs, Innovation & Transformation), **Gore Mutual Insurance**
Director, Digital Banking, **Meridian Credit Union**
Director, Digital Development & Integration, **Royal & Sun Alliance**
Director, Digital Marketing, **PC Bank**
Director, Digital Marketing, **President's Choice Financial**
Director, Digital Marketing & Acquisition, **Questrade**
Director, Digital Marketing & eCommerce, **Allstate Insurance**
Director, Digital Marketing & Optimization, **RBC**
Director, Digital Marketing, **Fidelity Investments**
Director, Digital Marketing, **Moneris Solutions**
Director, Digital Media, **Fidelity Investments**
Director, Digital Performance Marketing, **BMO Financial Group**
Director, Digital Solutions, **The Co-operators**
Director, Digital Strategy & Technology, **Canadian Credit Union Association**
Director, Direct Marketing, **Scotiabank**
Director, eMarketing, **Dynamic Funds**
Director, Global Brand Operations, Global Marketing, **Manulife Financial**
Director, Global Digital Marketing Strategy, **Scotiabank**
Director, Multimedia & Internet Design, **AGF Management**
Director, Online Media Sales, **Echelon Financial**
Director, Product, **Borrowell**
Director, Retail Products & Solutions, **Fidelity Investments**
Director, Social & Emerging Media, **Scotiabank**
Director, Social Media, **Capital One**
Director, Strategic Marketing, **Manulife Financial**
Director, Strategy & Business Development, **Empire Life**
Director, User Experience | Digital RSA, **Royal & Sun Alliance**
Director, Wealth Management, Sales Strategies & Support, **Great-West Life**
Director, Web Communication, **CIBC Mellon Global Securities Services Company**
Director, Web Strategy, **Northbridge Financial**
ebusiness Manager, **Russell Investments**
ECommerce & Digital Business Manager, **Gore Mutual Insurance**
eMedia Manager, **London Life Insurance Company**
EVP Head of Marketing, **Horizons Exchange Traded Funds**
EVP Member & Community Engagement, **MD Physician Services**
EVP Member Solutions **MD Physician Services**

EVP Products & Marketing, **Fidelity Investments**
 EVP Retail Markets & Strategic Investment Partnerships, **Fiera Capital**
 Executive Director, Digital & Client Experience, **CIBC**
 Founding Partner & Director, Products & Services, **Insurance-Canada.ca**
 Global Director B2B Social Media, **CFA Institute**
 Global Head Social Media Compliance & Senior Manager Canadian Privacy, **TD Bank Group**

H - L

Head of Acquisition Marketing, Americas, **Western Union**
 Head of B2B, Partner & Product Marketing, **Mastercard**
 Head of Content Development, **Capital One**
 Head of Creative Services, **BMO Capital Markets**
 Head of Digital Business, Canada **Western Union**
 Head of Marketing & Communication, **National Bank of Canada**
 Head of Marketing & Communications, **Marsh Risk Consulting**
 Head of Marketing, **BMO Nesbitt Burns**
 Head of Marketing, **First Canadian Title**
 Head of Marketing, Walmart Financial, **Walmart Canada**
 Head of Product, **First Canadian Title**
 Head of Social Media & Digital Content, **BMO Financial Group**
 Internet Marketing Manager, **Assumption Life**
 Investment Analyst & Manager, Marketing & Communications, **W. A. Robinson**
 Lead, Marketing Programs, **MD Financial Management**
 Lead Content Strategist, **Wells Fargo**
 Lead Developer, **Canso Investment Counsel**
 Lead Writer/Director, Creative & Communications, **Educators Financial Group**
 Lead, Brand & Creative Services, **MD Financial Management**
 Lead, Digital Brokers, **Aviva Canada**
 Leader, Investment Operations, **National Bank of Canada**
 Leader, Strategic Talent Acquisition Projects, **Intact Insurance**

M - O

Manager, Employee Digital Experience, **Farm Credit Canada**
 Manager, Branch Marketing Strategy, **First Ontario Credit Union**
 Manager, IT & Web Projects, **NEI Investments**
 Manager of Marketing, **East Coast Credit Union**
 Manager, Application Development, **Invesco**
 Manager, B2B Digital Experience, **CAA South Central Ontario**
 Manager, Channel Marketing, **FBC**
 Manager, Communication & Change Management, Business Transformation, **Scotia Asset Management**
 Manager, Consumer Marketing Street Capital, **Bank of Canada**
 Manager, Content Marketing, PR & Social, **Horizons Exchange Traded Funds**
 Manager, Digital Capabilities, **HomeEquity Bank**
 Manager, Digital Experience, **Servus Credit Union**
 Manager, Digital Marketing, **HomeEquity Bank**
 Manager, Digital Strategy, Marketing & Communications, **Canaccord Genuity Wealth Management**
 Manager, Digital Marketing, **Allstate Insurance Company of Canada**
 Manager, Direct Marketing, **Bank of Nova Scotia - Scotia Leasing**

Manager, Integrated Marketing, **Moneris Solutions**
Manager, Marketing Analytics, **Allstate Insurance Company of Canada**
Manager, Marketing, **IAB Canada**
Manager, Marketing, **La Capitale Financial Security**
Manager, Marketing, **Richardson GMP**
Manager, Marketing Strategy, **Canadian Tire Bank**
Manager, Member Services, **IAB Canada**
Manager, New Advisor Development, **Freedom 55 Financial**
Manager, Product & Channels, **Assiniboine Credit Union**
Manager, Products & Client Services, **Veriday**
Manager, Research, **Central 1 Credit Union**
Manager, Sales Strategy, **Franklin Templeton Investments**
Manager, Senior Executive Officer & Social Media Marketing, **Pivotal Payments**
Manager, Strategic Marketing, **Canadian Tire Bank**
Manager, Strategy & Privacy Officer, **Peel Mutual Insurance**
Manager, Systems & Finance, **Estonian Credit Union**
Managing Director of Marketing, Strategy & Operations, **ATB Financial**
Managing Director & Executive Project Support, **Charles Schwab**
Managing Director & Head of Growth, CMO, **Citi Financial**
Managing Director & Portfolio Manager, **Middlefield Capital**
Managing Director Marketing, **BlackRock**
Managing Director, Digital Marketing, **BNY Mellon**
Managing Partner, **BridgePoint Financial Group**
Marketing & Communications Manager, **Mainstreet Credit Union**
Marketing & Communications Manager, **Brandes Investment Partners & Co.**
Marketing & Communications Manager, **CRI Canada**
Marketing & Communications Manager, **Alterna Savings**
Marketing Communications & Brand Manager, **TuGo**
Marketing Communications Manager, Acquisition, **Tangerine**
Marketing Communications Manager, **First National Financial LP**
Marketing Content Manager, **American Century Investments**
Marketing Director, **TuGo**
Marketing Director, Europe, Middle East & Africa, **Aon**
Marketing Lead, **Borrowell**
Marketing Manager, **Bergengren Credit Union**
Marketing Manager, **Bridgehouse Asset Managers**
Marketing Manager, **Canaccord Genuity Wealth Management**
Marketing Manager, **Hesperian Capital Management**
Marketing Manager, **Hyundai Capital Canada**
Marketing Manager, **iFinance Canada**
Marketing Manager, **Kawartha Credit Union**
Marketing Manager, **NEI Investments**
Marketing Manager, **Sionna Investment Managers**
Marketing Manager, **TIMC**
Marketing Manager, **True North Mortgage**
Marketing Manager, **Value Partners Investments**
Marketing Manager, **Vanguard Investments**
Marketing Manager, **Your Neighbourhood Credit Union**
Marketing Manager, Awareness & Acquisition, **Walmart Canada**
Marketing Manager, Corporate Communications & Marketing, **Raymond James**

P - S

President & CEO, **DUCA Financial Services Credit Union**
 President & CEO, **Trapeze Asset Management**
 President & CEO, **FaithLife Financial**
 President Canadian, **Internet Marketing Association**
 President, **IAB Canada**
 President, **Investor Education Fund**
 President, **LifeInsuranceCanada.com**
 President, **Thorpe Benefits**
 President, **Carte Wealth Management**
 Product Manager, Digital Sales & Marketing, **Bank of America**
 Program & Relationship Manager, **The Cooperators**
 Program Manager, FCC Learning, **Farm Credit Canada**
 Senior Business Sales & Marketing Specialist, **Canadian Western Bank**
 Senior Digital Marketing Manager, **IA Clarington**
 Senior Director Media, **CIBC**
 Senior Director, **Avanade**
 Senior Director, Brand & Marketing, **President's Choice Financial**
 Senior Director, Brand Marketing **CIBC**
 Senior Director, eBusiness **Loyalty One**
 Senior Director, Global Marketing Communications, **Finca Impact Finance**
 Senior Director, Omni-Channel Integration, **Co-operators Life Insurance**
 Senior Director, Social Media, Content & Strategic Initiatives, **RBC**
 Senior Manager, Digital Properties, **PC Bank**
 Senior Manager, Content & Social Media Marketing, **Tangerine**
 Senior Manager, Communications, **Russell Investments**
 Senior Manager, Planning & Divisional Marketing, **Bank of Nova Scotia - Scotia Leasing**
 Senior Manager, Community Marketing, **Western Union**
 Senior Manager, Digital Experience, **American Express**
 Senior Manager, Digital Marketing, **HSBC**
 Senior Manager, Digital Marketing Strategy, **Home Capital Group**
 Senior Manager, Digital Payments, **Bank of Nova Scotia - Scotia Leasing**
 Senior Manager, eChannel & Mobile Solutions, **MBNA**
 Senior Manager, Lending Product Strategy, **Charles Schwab**
 Senior Manager, Marketing, **TMX Group**
 Senior Manager, Marketing, **Dynamic Funds**
 Senior Manager, Mass Media, **Tangerine**
 Senior Manager, National Media & Communications, **Canadian Credit Union Association**
 Senior Manager, Product Communication & Experience, **Scotia Asset Management**
 Senior Manager, Strategic Product Development, **Broadridge Financial Solutions**
 Senior Manager, Web Analytics, Optimization & Programmatic Marketing, **National Bank of Canada**
 Senior Marketing & Event Manager, **Investment Planning Counsel**
 Senior Marketing Manager, **Bank of Nova Scotia - Scotia Leasing**
 Senior Marketing Manager, **Interac Association**
 Senior Marketing Manager, **Russell Investments**
 Senior Program Manager, Customer Marketing, Residential, **First National Financial**
 Senior Regional Marketing Manager, **MNP Corporate Finance**
 SEO & SEM Manager, **Great-West Life**
 Social Media Community Manager, **Invesco**

SVP & Chief Compliance Officer (Canada), **Macquarie Group**
 SVP & Chief Distribution Officer, **Ivari**
 SVP & Chief Portfolio Manager, **Canaccord Genuity Wealth Management**
 SVP & CMO, **Curian Capital**
 SVP & Head of Innovation, **Brown Brothers Harriman**
 SVP & Head of Online Brokerage & Digital Insurance, Product & Marketing, **Qtrade Financial Group**
 SVP Branding & Communications **Greystone Managed Investments**
 SVP Business Development & CMO, **PSA Insurance**
 SVP Client Services, **CI Investments**
 SVP Communications & Human Resources, **Ivari**
 SVP Communications, **MBNA**
 SVP Customer Experience, **MBNA**
 SVP Customer Innovation & Experience, **Northbridge Financial**
 SVP Digital & Analytics & COO, **Meridian Credit Union**
 SVP Digital Services Marketing & Infrastructure, **Citi**
 SVP Digital Strategy & Innovation, **Banco Popular**
 SVP Distribution, **B2B Bank**
 SVP Enterprise Transformation, **National Bank of Canada**
 SVP Marketing, **CI Investments**
 SVP Marketing & Branding, **TMX Group**
 SVP Marketing & Communications, **FIRST Insurance Funding of Canada**
 SVP Marketing & Public Affairs, **Business Development Bank of Canada**
 SVP Marketing, Global Wealth Management, Insurance & Global Business Banking **Scotiabank Wealth Management**
 SVP Personal Lines, **Mass Insurance Brokers**
 SVP Product Development & Strategic Initiatives, **MCAP Service Corporation**
 SVP Platform Marketing, **Webster Bank**

T - Z

VP & CMO, **Empire Life**
 VP & Head of Marketing, Canada, **MasterCard Worldwide**
 VP & Head of Product & Strategy, **Visa**
 VP & Head Social Media, **Regions Bank**
 VP Brand & Creative Services, **AGF Management**
 VP Brand, Marketing & Communications, **NBH Bank**
 VP Business Development & Marketing, **MBNA**
 VP Client & Marketing Strategy, **RBC Capital Markets**
 VP Client Engagement & Experience, **Mackenzie Investments**
 VP Communications & Marketing, **Canadian Credit Union Association**
 VP Communications, **CI Investments**
 VP Consumer & Digital Marketing, **MasterCard Worldwide**
 VP Corporate Marketing & Shared Services, **Foresters Financial**
 VP Corporate Marketing, **Northbridge Financial**
 VP Digital Customer Experience, **TD Bank**
 VP Digital Marketing, **Investors Group**
 VP Digital Marketing, **Mackenzie Investments**
 VP Digital Marketing, **CI Investments**
 VP Digital Marketing, **Fairstone Financial**
 VP Digital Marketing, **Ignite Insurance**
 VP Digital Marketing, **Sprott Asset Management**

VP Direct Marketing, **American Century Investments**
VP eMarketing, **AGF Management**
VP Global Content Strategy, Planning, & Operations, **JP Morgan Asset Management**
VP Global Digital, Brand & Marketing, **Sun Life Financial**
VP Global Targeted Marketing, **Scotiabank**
VP Legal & Compliance, **Dundee Capital Markets**
VP Lend Sales & Service, **MCAP Service Corporation**
VP Marketing, **B2B Bank**
VP Marketing, **BluMont Capital**
VP Marketing, **CDSPI**
VP Marketing, **CST Consultants**
VP Marketing, **Front Street Capital**
VP Marketing, **Home Trust Company**
VP Marketing, **HomeEquity Bank**
VP Marketing, **Investment Planning Counsel**
VP Marketing, **Mayberry Investments**
VP Marketing, **Richardson GMP**
VP Marketing, **RSA Canada**
VP Marketing, **Tompkins Financial Corporation**
VP Marketing, **W. A. Robinson**
VP Marketing & Client Relationships, **Newport Private Wealth**
VP Marketing & Communications, **The Co-operators**
VP Marketing & Communications, **Credential Financial**
VP Marketing & Communications, **IA Clarington**
VP Marketing & Communications, **RBC Global Asset Management**
VP Marketing & Corporate Communications, **Kawartha Credit Union**
VP Marketing & Direct Distribution, **Canadian Bar Insurance Association**
VP Marketing & Strategy, **Caisse Financial Group**
VP Marketing Intelligence & Services, **Greystone Managed Investments**
VP Marketing, Communications & Digital Experience **Qtrade Financial Group**
VP Market & Fraternal Development, **FaithLife Financial**
VP Operations & Service Delivery, **DUCA Financial Services Credit Union**
VP Production, **ICF Olson**
VP Product, Marketing & Operations, **Parkview Capital Partners**
VP Sales & Marketing, **Assumption Life**
VP Social Media Marketing & Communication, **Prudential Financial**
VP Solutions, **CRI Canada**
VP Technology, **Canaccord Financial**

Objective-Driven Packages to Attain your Business Goals

	PLATINUM <i>Plenary Speakers</i>	GOLD <i>Plenary Speakers</i>	SILVER <i>Panel/ Stream Speaking</i>	BRONZE <i>Exhibitor</i>
YOUR BUSINESS OBJECTIVES	Maximum Outcome (Title Sponsor)	Thought Leadership	Thought Leadership	Branding
Speaking	✓	✓	✓	
Lead Generation	✓	✓	✓	✓
Virtual Roundtable	✓			
Branding & Social Media	✓	✓	✓	✓
Analytics & Audience Insights	✓	✓	✓	✓
Virtual Booth	✓	✓	✓	✓
Passes	4	3	2	1
PR	✓	✓	✓	



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DARREN HAUGHIAN

1-866 298-9343 x 276

darren@strategyinstitute.com

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 @DMFinancialServ

 Digital Marketing for Financial Services

 DMFS TO Summit

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