

13th Annual

# Digital Marketing *for* Financial Services Summit CANADA

6-7 June, 2023

Hyatt Regency Hotel Toronto  
Toronto, Ontario

**THE ONLY EVENT  
DEDICATED TO  
BEST-IN-CLASS  
DIGITAL MARKETING  
TACTICS FOR  
THE FINANCIAL  
SERVICES INDUSTRY**



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# Digital Marketing *for* Financial Services Summit

## CANADA

Welcome to the **13th edition of the DMFS Canada Summit**. This is one of the leading events in our portfolio of digital marketing for financial services summits, joined by our conferences in New York, Chicago and San Francisco.

This year's Canadian edition features solutions-based case studies, interactive discussions, implementation takeaways, curated breakout learning and vital face-to-face networking opportunities. We deliberately design the program to encourage you to build relationships with like-minded industry peers. Our onsite conference experience and immersive event platform allow you to network in small working groups, peer-led breakouts, roundtables and much more!

**Secure your spot** today to join Canada's top marketers and learn from the best!

## THRIVE IN THE NEW 2023 DIGITAL MARKETING ECONOMY

- ✓ Engage with our **CMO Power Panel** to learn how speed and flexibility can transform your marketing impact.
- ✓ Spark new ways of thinking, break through assumptions and question past digital marketing wisdom with **AMEX Bank of Canada, Sun Life and Visa**
- ✓ Make sense of the **metaverse, DeFi, Web 3.0** and the opportunity they are presenting to digital marketers
- ✓ Define digital marketing's role in driving commercial growth with **HSBC, Scotiabank and Manulife**
- ✓ Discover a clearer **MarTech investment path** with the latest digital platforms, tools and AI insights.
- ✓ Optimize digital marketing budgets with **Nationwide** to convert every touchpoint into a digital asset.

# UNRIVALLED EXPERTISE AND SHARED INNOVATION



Be inspired by the **latest trends** exploding across the FinServ marketing landscape, such as MarTech stacks, storytelling, AI and mobile.

Discover how the visionaries behind the **most advanced financial services brands** stay ahead of the curve by investing in branding that reinforces their values.

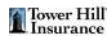


Fast track your **social media understanding** and ensure you are at the cutting-edge of tech and best practice.

Pinpoint the best team members, reskill, upskill, and **invest in the right people** to deliver great digital marketing experiences.







# Who attends?



“

*“Encouraging to see innovative and creative ways to solve the issues, constraints and challenges in a highly regulated industry. It’s nice to get out of your comfortable home environment to meet peers face to face, who have new and inspiring ideas.”*

Bank of America



“

*“The wealth of experience at the conference is amazing. If you are the Digital Marketing field for Financial Services, this is one of the must-see, must-attend conferences.”*

Macquarie Banking and Financial Services

“

*“One of the best parts about events like this is actually getting to hear case studies, instead of the op-ed pieces 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

“

*“It was a great experience. It was really interesting to hear different perspectives on what is a bit of a niche industry and niche practice. I’ve been to other marketing conferences that are a bit more broad, so I felt like at this particular conference I was able to write down a lot of key takeaways that I can implement in what I do every day.”*

State Street Global Advisors



“

*“The content and speakers exceed my expectations!”*

Oxford Financial Group

“

*“Excellent quality of presenters. Good variety of topics around digital issues, even beyond marketing.”*

Standard Life

# Speakers include



**MILOS VRANESEVIC**  
SVP and Global Chief Marketing Officer



**VALÉRIE LAVOIE**  
President & Chief Operating Officer



**NADIR SHAH**  
Senior Director Social, Global Content Centre of Excellence



**WAYNE KAINU**  
Head of Mortgages



**MEGAN DOUGLAS**  
SVP & Chief Brand & Commercial Officer



**GARETH H GASTON**  
Executive Vice President, CDO, Digital Platforms & Capabilities



**EUGENE WEN**  
VP Group Advanced Analytics



**ADAM SWINEMAR**  
SVP Digital, Product and Marketing



**ANTHONY V. LAMBIE**  
Associate Vice President Marketing Technology



**DEVATANU BANERJEE**  
Head - Smart Channels Delivery, North America



**VAHAN DER KALOUSSIAN**  
Director of Data Science



**KRISTI DARABAN**  
Associate Vice President, Marketing (Social Media)



**DAVID MOORE**  
Chief Marketing Officer, SVP Digital Banking & Analytics



**HELEN LEACH-EDWARDS**  
Chief Compliance Officer



**RENU SIHRA SEHMI**  
Director, Marketing Operations



# What You'll Learn About

The agenda for this 2-day conference has been designed around several core topics, including:



## DIGITAL CUSTOMER ACQUISITION

A connected digital strategy has never been more important, as marketing budgets are squeezed, and the priority becomes maximizing the value of your outputs. Get inspired and hear first-hand about how to get started and scale up your acquisition strategy to solve business challenges and discover new opportunities for growth.



## AI, METAVERSE, NEW TECHNOLOGY

The choices financial services organizations make next will impact the world and its structure in more ways than we can imagine, and it all points to shifts in people's relationships. Take practical steps to fully embrace and balance digital.



## DATA ANALYTICS

Data analytics strategy is under pressure to prove its value and deliver more. Businesses also need innovative and resilient analytics requirements. Find out how to shape your roadmap and how to effectively prioritize digital big data adoption across the marketing team.



## SEAMLESS DIGITAL EXPERIENCE

Digital platforms and cloud migration is the way forward for many FS companies, but the route to success can be fragmented and muddled. These sessions will provide a framework to help you navigate the complex cloud landscape effectively.



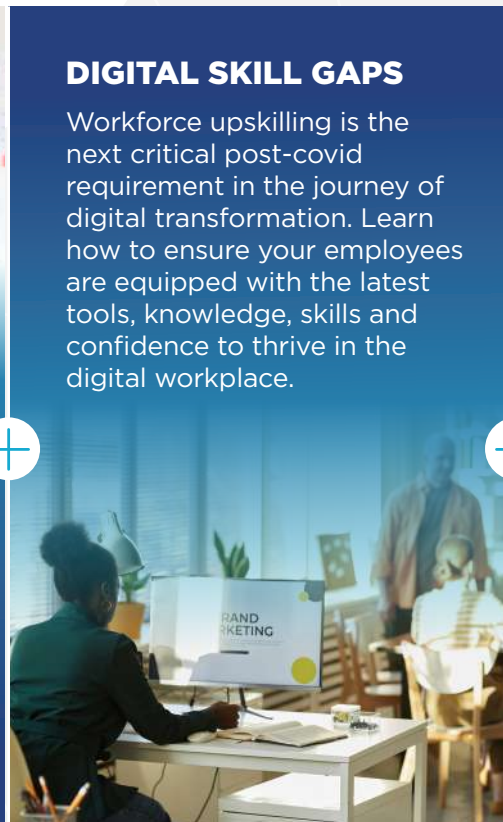
# What You'll Learn About

The agenda for this 2-day conference has been carefully curated around result-oriented sessions, including:



## CUSTOMER LIFECYCLE

In these practical discussions, learn how to build digital marketing best practices by recognizing that employees are consumers too, and how their own experiences translate to better customer experiences.



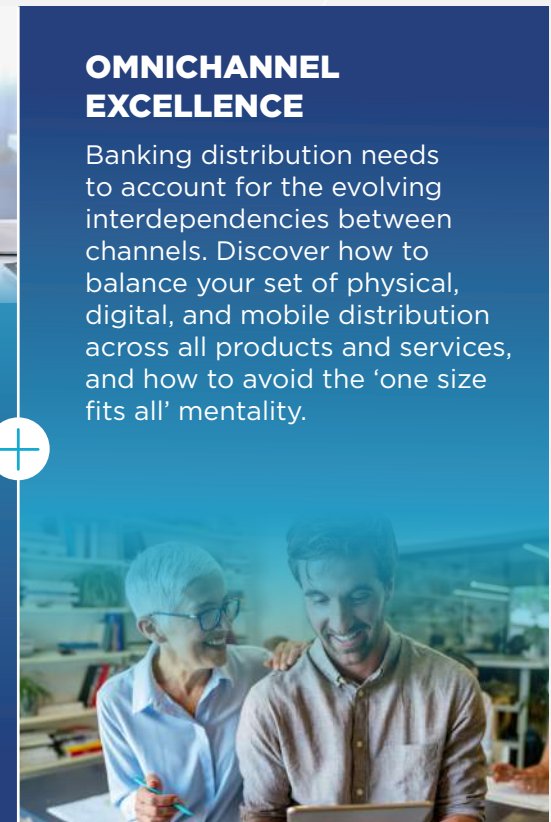
## DIGITAL SKILL GAPS

Workforce upskilling is the next critical post-covid requirement in the journey of digital transformation. Learn how to ensure your employees are equipped with the latest tools, knowledge, skills and confidence to thrive in the digital workplace.



## SOCIAL MEDIA & CONTENT

As more brands invest in digital content, the quick wins they need have become harder to achieve. To stick out from the crowd, the most successful financial brands are investing in longer content with higher production values. In this important session, you will learn how your digital marketing teams can produce better reading experiences and content engagement for their leads.investment.



## OMNICHANNEL EXCELLENCE

Banking distribution needs to account for the evolving interdependencies between channels. Discover how to balance your set of physical, digital, and mobile distribution across all products and services, and how to avoid the 'one size fits all' mentality.



[Check out the full agenda](#)



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## How to register

### IN-PERSON PASS

#### FULL TWO-DAY ACCESS:

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables and one week of pre-event networking via our dedicated platform

#### FACE-TO-FACE NETWORKING:

Connect and build valuable relationships with our audience of thought leaders

#### 5-STAR TREATMENT:

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location

#### EXPO HALL:

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

#### SPEAKER PRESENTATIONS:

Take home 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**  
(20 Feb - 24 March)

**\$1,695**

**Early bird**  
(25 March - 28 April)

**\$1,895**

**Regular Ticket**

**\$2,295**

### VIRTUAL PASS

#### TWO-DAY LIVE STREAM ACCESS:

Tune into keynote sessions, panel discussions and case studies with real-time Q&A from the comfort of your home

#### VIRTUAL NETWORKING:

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool

#### 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

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**REGISTER NOW**

### VENDORS/ SUPPLIERS/ CONSULTANTS

Add value and showcase your expertise to decision-makers looking to invest in impactful solutions. Reach out for more information with a 24-hour turnaround! Contact:

**Darren Haughian,**  
Sponsorship Manager  
T: 1-866-298-9343 ext. 276  
E: darren@strategyinstitute.com

### GROUP RATES

To be eligible for group rates, delegates **MUST** register at the same time. The total discount per delegate (including applicable group discounts, etc.) **MUST** not exceed 25% of the regular conference cost.

For more information and to book your group passes, contact

**Sam Caskey,**  
Delegate Registration Manager  
E: sam.caskey@strategyinstitute.com