

13th Annual

Digital Marketing *for* Financial Services Summit

CANADA

June 6 & June 7, 2023

Hyatt Regency Hotel Toronto
Toronto, Ontario

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



New for 2023



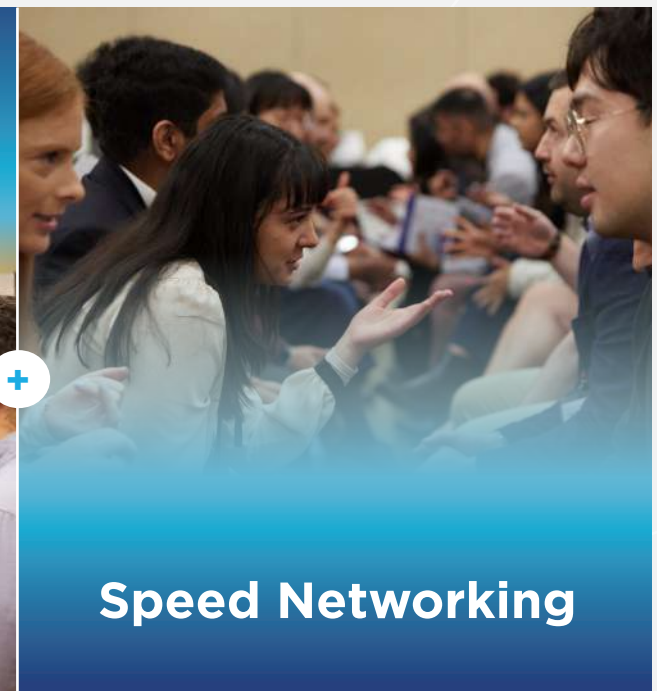
We offer a unique immersive format that includes:



Workshops



Roundtables



Speed Networking

Step out of your comfort zone and fully engage in the experience!

Speaker Preview



... ANY MANY MORE!



ALEX LEDUC
Founder & CEO



AMRESH MATHUR
Head of Digital Acquisition
and Customer Experience



**SHARANYA
RAVICHANDRAN**
Vice President, Design,
Digital Channels



VALÉRIE LAVOIE
President & Chief
Operating Officer



IDRISS BOUHOUC
Digital Partnerships Lead



**KERRY-ANN
STIMPSON**
Chief Marketing Officer



**MATTHEW
BENNETT**
Director & Head
of Growth and
Performance Marketing



CHARLENE RAMDEO
Vice President, IA Innovation
Deployment and Adoption



WAYNE KAINU
Head of Mortgages



EUGENE WEN
VP Group Advanced
Analytics



KERRY JANISCH
Assistant Vice President, SEO



NICK NUNES
Director, Enterprise
Social Media



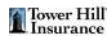
**MICHELLE
ALFANO**
Director of Paid
Digital Marketing



JOHN T. RENZ
Vice President, Group
Creative Director



**RENU SIHRA
SEHMI**
Director, Marketing
Operations



Who Attends?



AGENDA - DAY 1

Tuesday, June 6th, 2023

7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **digital marketing leaders** from the financial services sector.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices** and prepare for the day ahead.

8:45 AM OPENING COMMENTS FROM YOUR HOST

Gain insight into today's sessions so you can get the most out of your conference experience.

Tim Hines, Chief Marketing Officer, **AmTrav**

9:00 AM CMO GAMECHANGERS PANEL: THRIVING IN THE AGE OF CHATGPT

Personalization, Content Creation, Customer Engagement

ChatGPT has over 100 million users and rising. As Generative AI continues to develop at a rapid pace with the sudden emergence of digital tools: creating data, imagery, audio and abundant content. How can you fulfill the promise of this revolution to boost analytics and decision-making abilities along with creativity. Let's take a confident step to fundamentally change the way financial services reach consumers. Find the right path for your organization by:

- Harnessing disruptive Generative AI amongst a raft of marketing tools for enhanced engagement
- Using AI to uncover insights and patterns in customer data
- Creating better digital campaigns with super-personalized content

Unlocking the potential of intuitive disruptive technologies to drive growth and efficiencies.

Tim Hines, Chief Marketing Officer, **AmTrav** MODERATOR

Amresh Mathur, Head of Digital Acquisition and Customer Experience, **Citizens Bank**

Charlene Ramdeo, Vice President, IA Innovation Deployment and Adoption, **Citi**

Derek Szeto, Co-founder, CEO, **Walnut Insurance Inc.**

9:30 AM THE FINTECH CEO'S FIRESIDE CHAT: GETTING TO 3 YEARS FROM NOW ... QUICKER

Pinpointing the Main Forces for Growth: Creativity, Risk-Taking and Cross-Functional Collaboration

Marketing has gone through a renaissance over the past 10 years, but while much has changed, there is much more change still to come!

Data and analytics may have gained prominence over creativity in addressing modern digital marketing challenges, but the latter can still be valuable - if it's done right. Get your blueprint to a more robust and creative future:

- How to evaluate marketing in the C-suite: How we expect the business case whether in-house or agency
- Accelerating change: digitization of the operating process and the biggest investment in technology
- Bigger, bolder leadership: navigating tough economic times and our outlook

Empowering Canada's top financial services leaders to become stronger digital marketing strategists.

Tim Hines, Chief Marketing Officer, **AmTrav** MODERATOR

Alex Leduc, Founder & CEO, **Perch**

Michael Garrity, CEO, **Financeit**

10:00 AM INDUSTRY EXPERT: THE POWER DUO

The Synergy of Paid and Organic Search

A multi-channel, holistic approach is a must in today's digital age. As teams and channels have been segmented, financial marketers are forced to find synergies on how paid and organic search can work together in order to maximize the overall digital shelf space. Hear what it means to:

- Develop a cohesive search strategy.
- Understand the roles of the channels and how they can complement each other.
- Ultimately some key factors and ways to deliver a connected search program.

Join us today on this hot topic that leads discussions around integrated search.

Wayne Cichanski, Vice President, Search & Site Experience, **iQuanti, Inc.**
Shaubhik Ray, Senior Director, Digital Solutions, **iQuanti, Inc.**

10:30 AM SPEED NETWORKING! → MAKE MEANINGFUL CONNECTIONS

Grow your network by meeting like-minded individuals to share your latest ideas and projects with:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships.**
- Achieve your conference networking goals in a **fun and agile fashion.**
- **Join a community** of digital marketing leaders and gain invaluable support.

AGENDA - DAY 1

Tuesday, June 6th, 2023

11:00 AM EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the **latest financial marketing technology** and strategies with our industry leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

11:15 AM INDUSTRY EXPERT: EXPECT MORE FROM YOUR CUSTOMERS' REVIEWS

How to Turn Customer Reviews and the Voice of the Customer into a Positive and Transformational Driver of Business Revenue

Reviews and ratings have become the single most influential factor in making a purchase decision according to 98% of consumers, surpassing price and personal recommendations. But engaging with audiences in regulated industries like financial services is particularly challenging. In this session, we will explore:

- Responding to reviews in a way that turns negatives into positives and positives into advocates for your brand
- How to build volume and quality of positive reviews authentically and efficiently
- Measuring the impact of reputation management on the business
- How to you build a review moderation team and strategy

Essential lessons from leading brands: Achieving transformational results by actively managing their online reputation.

Nasser Sahlool, Senior Vice President, Client Strategy, **DAC**

11:45 AM SOCIAL POWER PANEL: SOCIAL MEDIA'S BIG DAY OUT

Social media marketing is only one aspect of digital marketing, but as today's world has become increasingly social, it's one in which financial services are gaining traction and ground through innovative campaigns across Facebook, Twitter, Instagram, YouTube, Google+, Snapchat, TikTok, etc. As we create our digital marketing strategy, categorizing outreach into paid, owned, and earned media can help you build a cohesive formula that leverages content at the right place, and right time. Achieve the optimum combination of digital marketing services to reach more people at once by leveraging the power of social media, search engines, and other online channels. Master the success factors to:

- Gain customer advantage through creative ways to approach new platforms
- The rise of influencers from macro to micro
- Owned, earned and paid media

- Avoid generic social media tactics and better harness engagement polls, recurring series, searching for, and engaging with, social mentions
- Use short-form video where it makes sense for your brand (TikTok, Reels, YouTube Shorts)

Developing a robust media strategy blueprint to drive revenue.

Tim Hines, Chief Marketing Officer, **AmTrav** **MODERATOR**

Baaba Hughes, Social Media Director, **Adelaide Capital**

Nick Nunes, Director, Enterprise Social Media, **BMO Financial Group**

Paula Lanza, Social Media Program Manager, **TD**

12:15 PM INDUSTRY EXPERT

How Can FI's Use Tools and Personalized Video to be More Authentic and Human in a Post-Pandemic World

Financial institutions can benefit in several ways by utilizing more personalized video in their marketing strategies. Find out in this deep dive session how the use of personalized video can help create a deeper connection with customers, leading to increased trust, loyalty, and customer satisfaction. Adopt best practices to:

- Determine which advanced tools and technologies can help to create personalized video experiences
- Working 'at scale' to improve efficiency and reduce costs while delivering highly engaging content
- How to differentiate yourselves in a crowded marketplace
- Attract new customers while driving sales and revenue growth

Build holistic, more compelling customer experiences across channels.

Shannon Sloan, Director, New Business Development, **Rich Media**

12:45 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest financial industry issues**
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **financial marketing colleagues**.

1:45 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

AGENDA - DAY 1

Tuesday, June 6th, 2023

2:00 PM CASE STUDY

Transforming Complex B2B Presentations into Engaging Digital Experiences

Join us for an insightful presentation on how to transform your complex B2B presentations into engaging digital experiences that deliver real business results. In this session, you'll discover how to leverage technology, storytelling, and process to create powerful presentations that engage and resonate with your audience. Learn how to uncover the nuggets of data that can prevent expensive over purchasing of technology and maximize your return on investment. We'll also share tips on how to understand pre-insights into creative digital marketing and how to reach breakthroughs that will help you stand out in a crowded market:

- Uncovering the nuggets of data that can prevent expensive over purchasing of technology
- Maximizing your ROI: understanding pre-insights into creative digital marketing and reaching breakthroughs
- Power up your presentations: transforming your content into engaging experiences that deliver real business results

Don't miss out on this opportunity to power up your presentations and elevate your digital marketing game.

John T. Renz, Vice President, Group Creative Director, **Prudential Financial**

2:30 PM PANEL DISCUSSION

Rethinking How to Deliver a Safer, Richer and More Engaging Web Experience

Customers today are influenced by the financial services brands that are most relevant, convenient, and immediate in the delivery of everything from products to customer service. To compete, FS professionals must create stickier and more streamlined websites. Develop better websites, content, and design to fit in a world where no two customers have the same preferences and expectations. Master the success factors to:

- Navigate mobile first design: Grasp new possibilities for more innovative website and m-commerce capabilities
- Design a website which complies with customer privacy regulations in financial services
- Build better contextual content/experiences that become a lead generator for your brand

Build future-proof website strategies to enhance your brand positioning for the new digital era.

Kerry Janisch, Assistant Vice President, SEO, **US Bank**
Wayne Kainu, Head of Mortgages, **Neo Financial**

3:00 PM CASE STUDY: LISTEN UP! MAKING PODCASTS YOUR NEXT MISSION

Enabling the Liberation of Financial Services: Using Audio Content for your Digital Marketing

Audio content is beginning to emerge from the shadows and become a real asset in the content marketing space. Podcasts offer ease and convenience with both production and reception. Whether someone is driving to work, running, or just walking through town, listeners can enjoy a podcast at their own time and convenience. Making a podcast is very simple for a business. All you need is a device with recording software that you can upload to the internet. Adopt best practices to:

- Map the market: how financial services pioneers and early adopters are harnessing the power of the podcast
- How to thrive in the competitive world of influencers and podcasts
- The benefits for digital marketers: On-demand, cost-effective, personalization

Reach a greater number of financial services customers at a lower cost to build loyalty and brand advocates.

3:30 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of digital marketing innovation firsthand.
- Meet one on one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

AGENDA - DAY 1

Tuesday, June 6th, 2023

4:00 PM INDUSTRY EXPERT: FROM INSIGHTS TO ACTION AND MORE

As the digital world becomes more complex and privacy laws grow increasingly restrictive, marketers face many obstacles to solving their business challenges. Some of these challenges are new, but many have existed forever. In this topical session, join Larry Filler, Senior Vice President and Finance Practice Leader at Environics Analytics to guide you through a step-by-step action plan:

- To learn how organizations are blending first- and third-party data to improve insights about their customers and the markets they serve
- Discover how these insights can be actioned and measured in the digital world in a privacy-compliant way by leveraging DSPs, Publishers and Clean Rooms

Power up your digital transformation with organizational buy-in and privacy-compliant data to gain a competitive edge and immediate results.

Larry Filler, Senior Vice President & Practice Leader, **Environics Analytics**

4:30 PM POWER PANEL DISCUSSION: RISK AND REGULATION POST-SVB AND ECONOMIC CHANGE

How Can Regulation and Consumer Transparency Rebuild Confidence in Financial Services

The failures of SVB, and days later, Signature Bank, set off a broader loss of investor confidence in the banking sector that pummeled stocks and stoked fears of a full-blown financial crisis. With an increased focus on regulation and compliance, how can financial services marketers forge ahead with strong growth without breaching regulations. Take away specific solutions to:

- Opening up lines of communication between digital marketers and compliance teams
- Integrating technology tools to help manage change
- Empowering digital marketers to innovate with compliant services, content and communication

Determine where to put your efforts to prepare for a more regulated and risk averse world.

Lois Tullo, Chief Finance Officer, Chief Risk Officer, **Kuber Mortgage Investment Company**

5:00 PM CASE STUDY: GETTING OUT THERE FOR SOCIAL GROWTH

How to Launch, Engage and Create a Company-Wide Adventure with a New Employee Advocacy Program

As a senior digital marketer, you understand the increasing importance of leveraging social media to reach your target audience and drive business growth. By launching a new employee advocacy program, you can take your social media efforts to the next level and achieve impressive results. Hear firsthand how Manulife Investment Management launched an exciting new social media program:

- Amplify your reach: How to leverage your employees' social networks to expand your reach and amplify your brand message
- Establish thought leadership: Encourage your senior leaders, advisors and customers to share their insights and expertise on social media to build trust and credibility
- Boost employee engagement: Be clear about benefits – giving a sense of purpose and ownership in your organization's success via brand ambassadors on social media

Drive growth, establish authority, and foster a culture of engagement and success.

Idan Wainberg, Marketing Director, Social Media, Wealth and Asset Management, **Manulife Investment Management**

5:30 PM CLOSING COMMENTS FROM YOUR HOST

Review the key solutions and takeaways from today's sessions. Source a summary of action points to implement in your work. Discuss tomorrow's highlights!

Tim Hines, Chief Marketing Officer, **AmTrav**

5:40 PM EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC & NETWORKING

- **Relax and unwind** with tasty cocktails after a long day of learning.
- Don't miss your chance to win fun prizes at our **Reception Gift Giveaway**.
- Make dinner plans with your **new connections** and explore the best of what Toronto nightlife has to offer. Just be sure to set your alarm for Day 2!

6:40 PM DAY 1 CONFERENCE ADJOURNS

AGENDA - DAY 2

Wednesday, June 7th, 2023

7:30 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **digital marketing leaders** from the financial services sector.
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- Source practical tips, discuss **best practices** and prepare for the day ahead.

9:00 AM OPENING COMMENTS FROM YOUR HOST

Gain insight into today's sessions so you can get the most out of your conference experience.

Elizabeth Walford, Managing Director, **Walford Partners**

9:15 AM KEYNOTE PRESENTATION: OMNICHANNEL 'ALWAYS-ON' CUSTOMER

Taking Seamless Multichannel Digital Marketing to the Next Level of Complexity & ROI

A great omnichannel experience is what customers want now to become loyal customers. Not only do they want personalized website content, relatable social media posts and multiple touchpoints, but they expect it. How do you achieve this from a financial services perspective? What extra real-time and added features are the 'ultimate deciding factor' to win loyal customers and future fans? Develop a robust, flexible, and future-facing blueprint to:

- Identify the value 'adds' that make a difference: in-app chats, email support, contact centre calls, or chatbot to interact with customer support teams in real-time
- Pinpoint and bridge the gaps in customer journeys and nurture them with custom digital marketing solutions
- Use email and social media across channels to connect diverse audiences in their preferred way

Start a meaningful omnichannel conversation to build long-term, loyal customer relationships.

Joel Pomerleau, Innovation & Digital Banking, **BDC**

9:45 AM CMO POWER PANEL: DATA ANALYTICS

Successfully Translate Data into Actionable Insights for Personalized, Targeted & Compliant Digital Marketing

2023 will be the year of advanced data analytics. Data is the must-have fuel powering today's modern financial marketing initiatives and overall business decision making. During economic uncertainty, smart, data-driven FS organizations are asking how they can make better decisions by investing in data as a strategic asset. Walk away with an action plan to:

- Achieve well-tailored, data-driven customer journeys with effective data capturing strategies which unlock meaningful insights, streamline transformation, and support digital change
- Recognize how data strategies are evolving, what predictive and prescriptive analytics look like in 2023 and beyond, and how other financial services organizations are targeting and managing their data principles
- Guarantee boosted consumer trust and loyalty by establishing safe and secure digital channels and proven data security strategies

Action data insights to provide accurate customer segments and deliver tailored digital experiences.

Eugene Wen, VP Group Advanced Analytics, **Manulife** MODERATOR
Scott Feldman, CI360 Practice Lead, Canada, **SAS**

10:15 AM SPOTLIGHT SESSION: NEXT LEVEL ENGAGEMENT - CUSTOMER CONVERSATIONS

Taking Seamless Personalized ChatBot Technology to the Next Level of Complexity & ROI

A great experience is what customers want now to become loyal customers. Not only do they want personalized website content and relatable social media posts, but they also want a seamless point of contact. How do financial services achieve better engagement? Discover how to create a robust, flexible and future-facing blueprint:

- Which value 'adds' make the difference: in-app chats, email support, contact centre calls, or chatbot to interact with customer support teams in real-time?
- Pinpoint great technology which builds seamless chatbot solutions
- Connecting the chatbot experience across email and social media to deliver a more personalized experience

How to start a meaningful omnichannel conversation which builds into a long-term loyal relationship.

John McGraw, Director of Solutions Engineering, Financial Services & Insurance, **Yext**

AGENDA - DAY 2

Wednesday, June 7th, 2023

10:35 AM FIRESIDE CHAT: OWNED, EARNED AND PAID MEDIA - DEFINING A MORE EFFECTIVE MEDIA STRATEGY

Nurturing Best Practices That Work for All Channels

Navigating all the possible ways to communicate with digital online users and promote your brand can be a challenge. As we create our digital marketing strategy, categorizing outreach into paid, owned, and earned media can help you build a cohesive formula that leverages content at the right place, and right time. Take back to your office strategies to:

- Assess the use and potential of earned media vs owned media
- Measuring the effectiveness of paid media
- Understanding and defining the blurred boundaries of new media

Developing a robust media strategy blueprint to reach drive revenue.

Elizabeth Walford, Managing Director, **Walford Partners** MODERATOR

Matthew Bennett, Director & Head of Growth and Performance Marketing, **Tangerine**

Michelle Alfano, Director of Paid Digital Marketing, **Ally Financial**

11:05 AM EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest **financial marketing technology** and strategies with our industry leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

11:40 AM CASE STUDY

Increase Customer Engagement via Employee Brand Advocacy

As social media and content overload has become a more integrated part of our lives, find out how to gear up your internal marketing and communications to achieve greater recognition for your brand and ultimately financial products and services. Source practical tips to:

- Engage and retain employees with strategies that create strong connections with the company brand
- Pinpointing the key challenges of employees who shy away from being a part of employee advocacy programs, because of the pressure to generate content online. Does ChatGPT have a part of play?
- Captivate engagement with streamlined internal posts, newsletters, videos and podcasts which support a wider digital marketing strategy where content and tone of voice reflects your brand and drives connection with your customer base

Amplify your employee engagement to nurture, inform and mirror your financial customer base and help drive growth.

Kerry-Ann Betton Stimpson, Chief Marketing Officer, **JMMB Group**

12:10 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest financial services industry issues**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **digital marketing colleagues**.

1:10 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

1:30 PM ROUNDTABLES: SHARE & DISCOVER THOUGHT-PROVOKING IDEAS

INTERACTIVE DISCUSSION GROUPS

These informal peer-to-peer discussions are the perfect opportunity for you to gain further practical insights, brainstorm and discuss some of the most pressing issues affecting your role. Discussions will run concurrently for 30 minutes. Following the discussion, each table will share their top 3 practical take aways. Topics will include:

- ChatGPT: Harnessing Generative AI to make better digital marketing decisions
- Regulatory challenges and changes needed for digital marketers in FS
- Stretching your digital budget: How to do more with less money
- Moving from Web2 to Web3: Bitcoin and blockchain
- Using Influencers and Building B2C Communities
- Scaling Your Social Media Strategy

2:15 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of digital marketing innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

AGENDA - DAY 2

Wednesday, June 7th, 2023

2:45 PM PANEL: DRIVING INTERNAL DIGITAL CULTURE CHANGE

Employee Experience to Improve Employee Satisfaction and your Bottom Line

Rethink the employee experience amongst huge changes and challenges ahead from remote working to improving how we work can all support more effective digital marketing. Drive your company's digital and customer improvements to the next level with tips from one of Canada's Top 100 Employers. Take away specific solutions to:

- Harness positive results by blending digital transformation with employee engagement and experience
- Using inclusive strategies with DE&I that will help you create effective digital experiences
- Assess how both types of programs can improve internal communication and co-operation

Recognize the key links between digital experience and employee experience to improve your bottom line.

Elizabeth Walford, Managing Director, **Walford Partners** MODERATOR
Renu Sihra Sehmi, Director, Marketing Operations, **Scotiabank**
Kerry-Ann Betton Stimpson, Chief Marketing Officer, **JMMB Group**

3:15 PM CASE STUDY: METAVERSE & DIGITAL VS. HUMAN TOUCH - IS AI YOUR BEST NEW TEAM MEMBER?

Maintain the Balance Between Human Touchpoints & Digital Technologies to Reflect Customer Needs

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. Achieve a step-by-step action plan to:

- Respond to changes in customer behaviours to execute a more value-driven, relevant experience
- Balance the demand for hybrid, omni-channel experiences which intuitively directs between digital and human interactions
- Leverage crucial insights into data and customer behaviour to tailor CX strategies more effectively to customer needs

Improve customer engagement with your company beyond a "one-size-fits-all" approach to align with individual needs and increase satisfaction.

3:45 PM MARTECH POWER PANEL: WHERE TO INVEST BUDGET INTO FUTURE FINANCIAL SERVICES TECHNOLOGY

Cost-Saving IT: Tools and Tactics Across All Digital Marketing Levels

We are at the cutting edge of new disruptive trends and now is the time to plan future scenarios for fresh, innovative product development and distribution. Build an effective digital marketing offering in the next decade with the top 10 ideas to boost innovation after the crisis. Source your plan of action with:

- Setting up an integrated, cross-functional command centre
- Responding to diverse demand curves across call centres vs branch enquiries
- Adjusting your brand campaigns, sharing strategies and tactics with your key teams across the business
- Winning budget and measuring/demonstrating ROI for transformation

Harness software and IT investments to optimize an always on, 24/7 digitally robust marketing strategy.

Idriss Bouhmouch, Digital Partnerships Lead, **Banque Nationale**

4:15 PM CLOSING COMMENTS FROM YOUR HOST

Review the key solutions and takeaways from the conference. Source a summary of action points to implement in your work.

Elizabeth Walford, Managing Director, **Walford Partners**

4:30 PM CONFERENCE CONCLUDES

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Financial Services
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“

“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 in 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

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June 6 & June 7, 2023
Hyatt Regency Hotel Toronto
Toronto, Ontario

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

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

ON-DEMAND ACCESS:

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



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

REGISTER FOR DELEGATE PASS

Contact:

Sam Caskey
Delegate Sales Executive
Email: sam.caskey@strategyinstitute.com

Price

\$2,295 CAD

Price

\$1,695 CAD