

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



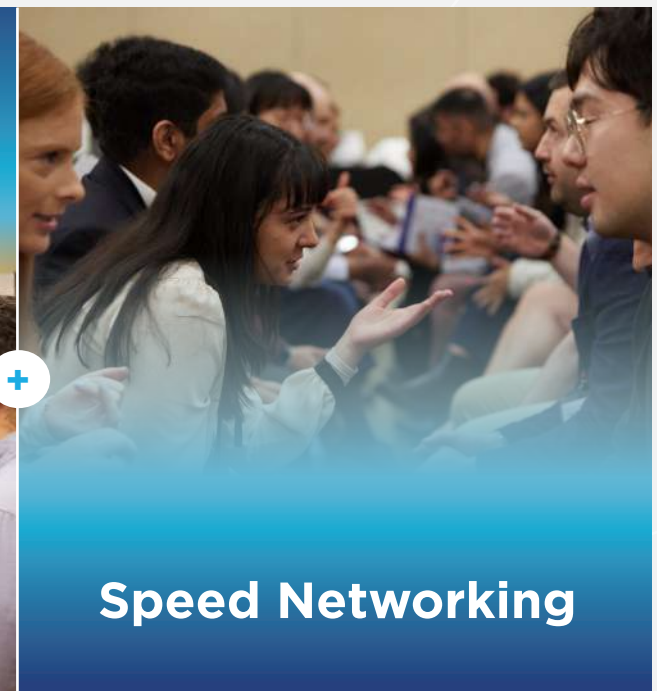
We offer a unique immersive format that includes:



**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



**LOIS TULLO**  
Chief Finance Officer,  
Chief Risk Officer



**MICHAEL GARRITY**  
CEO



**IDRISS BOUHMOUCH**  
Digital Partnerships Lead



**BAABA HUGHES**  
Social Media Director



**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-ANN STIMPSON**  
Chief Marketing Officer



**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





LOANS  
— CANADA —



FINANCIAL



FRANKLIN TEMPLETON  
INVESTMENTS



Equitable Life  
of Canada

duobank



Groupe Financier  
Financial Group



SUNRISE  
CREDIT UNION

Tangerine



Tower Hill  
Insurance



WORLD  
FINANCIAL  
GROUP



NATIONAL  
BANK  
OF CANADA



Fidelity  
INVESTMENTS

CIBC

# Who Attends?

BMO



AVIVA

VISA

usbank



Sun  
Life Financial

Scotiabank



SASKATCHEWAN  
BLUE CROSS

neo



CapitalOne



Desjardins  
Insurance



LAURENTIAN  
BANK

Manulife

Meridian

# 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.

## 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.

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

## 9:10 AM LEADERS 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 AI 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.**

## 9:40 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**

## 10:10 AM INDUSTRY EXPERT: THE POWER DUO

### Unlocking Paid and Organic Search Synergy Through Data

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.**

## 10:40 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

## 11:05 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.

## 11:20 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**

## 11:50 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**

## 12:30 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**.

## 1:30 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.

## 1:45 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

# AGENDA - DAY 1

Tuesday, June 6th, 2023

- 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**

## 2:15 PM INDUSTRY EXPERT

### How Can FIs 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 both tools and personalized video in their marketing strategies. Find out in this deep dive session how the use of tools and personalized video can help create a deeper connection with customers, leading to increased trust, loyalty and customer satisfaction. Adopt best practices to:

- Use tools and personalized videos to engage customers and provide unique experiences
- Improve efficiency and reduce costs while delivering highly engaging content
- Differentiate yourselves in a crowded marketplace
- Attract new customers and drive sales and revenue growth

*Build holistic, more compelling customer experiences across channels.*

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

## 2:45 PM PRESENTATION: MILLENNIALS - NEXT-GENERATION BEHAVIOURS AND PREFERENCES

### How to Challenge Your Understanding and Digital Marketing Practices to Win Hearts and Minds of Gen Z in Financial Services

The new golden age of audio creates opportunities for financial brands to modernize their marketing strategy when it comes to building meaningful connections with next-gen customers. Since 2019, Spotify has been asking Gen Z and Millennials around the world what drives them. In our most recent research, we uncover how these young Financial Services Intenders and Purchasers use digital audio to define themselves and inform their relationships with brands. Take a deep dive into what Gen Z & Millennial FS purchasers now expect:

- Communication with Gen Z and Millennials – tapping into their language, voice and sounds
- Participate in playlist culture: What impact does this have on financial services
- Driving two-way conversations between your younger target audience

*How financial services companies can thrive and win more customers from Gen Z.*

**Ivan Pehar**, Country Manager, **Spotify Canada**

## 3:15 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.

## 3:45 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**

# AGENDA - DAY 1

Tuesday, June 6th, 2023

## 4:15 PM FOCUS PRESENTATION: 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**

## 4:45 PM CASE STUDY: ABC'S OF BUILDING A HIGH-IMPACT MICRO-INFLUENCER PROGRAM FOR EXECUTIVES

As a senior digital marketer, you understand the increasing importance of helping your executives leverage social media to build their profiles, reach their target audience and drive business growth. Launching a new **Micro-Influencer Program** can help take your leadership's social media efforts to the next level and achieve impressive results. Learn the ins and outs of launching impactful Micro-influencer Programs for your executives:

- Amplify your reach: how to leverage LinkedIn to expand executive's reach and amplify their brand message
- Establish thought leadership: Encourage your senior leaders 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**

## 5:15 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**

## 5:20 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!

## 6:30 PM DAY 1 CONFERENCE ADJOURNS



# AGENDA - DAY 2

Wednesday, June 7th, 2023

## 8:00 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.

## 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.*

**Elizabeth Walford**, Managing Director, **Walford Partners** MODERATOR  
**Gregory Saget-Rudd**, Vice-President, Growth, **Nesto**  
**Gareth Tuppenney**, Director, Digital Experience, **London Stock Exchange Group (Canada)**  
**Vivianne Gauci**, SVP, Customer Experience & CMO, **HomeEquity Bank**

## 9:45 AM FIRESIDE CHAT: 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**  
**Idriss Bouhmouch**, Digital Partnerships Lead, **National Bank**

## 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 INDUSTRY EXPERT: THE HIDDEN VALUE OF SOCIAL CAPITAL

### Your Connections as a New Asset Class: 3 Lessons from my Journey

Reza Varzidehkar, a third-generation entrepreneur and first-generation immigrant, understands the importance of connections firsthand. Faced with the challenge of starting anew and establishing a network from scratch, he embarked on a mission to stand out during professional interactions. This pursuit led him to develop OVOU, a smart business card that enables contact sharing with a simple tap. His talk aims to inspire individuals to embrace new connections, expand their networks, and unlock their potential. Master the success factors to:

- Significance of building social capital and how it can propel personal and professional growth
- Facilitating meaningful connections in the digital age
- Smart business cards and the power of networking

*Implement practical frameworks and models to extend your personal digital connections*

**Reza Varzidehkar**, Founder, **OVOU**

## 12:40 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**.

## 1:40 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 2

Wednesday, June 7th, 2023

## 2:00 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**

## 2:30 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.*

**Elizabeth Walford**, Managing Director, **Walford Partners** MODERATOR  
**Idriss Bouhmouch**, Digital Partnerships Lead, **National Bank**  
**John T. Renz**, Vice President, Group Creative Director, **Prudential Financial**  
**Gregory Saget-Rudd**, Vice-President, Growth, **Nesto**

## 3:00 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.

## 3:15 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

## 4:00 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**

## 4:05 PM CONFERENCE CONCLUDES

13th Annual

**Digital Marketing** for  
**Financial Services**  
**Summit** CANADA

“

*“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



13th Annual

# Digital Marketing *for* Financial Services Summit CANADA

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**