



Digital Marketing *for* Financial Services

Portfolio of Events 2023

GROW YOUR
**FINANCIAL
SERVICES
MARKET
SHARE**

JOIN FORCES WITH NORTH AMERICA'S FINANCIAL MARKETING EVENT LEADER

EVENTS 2023

1

8th Annual
**Digital Marketing *for*
Financial Services
Summit** WEST

APRIL
26-27, 2023
SAN FRANCISCO

2

13th Annual
**Digital Marketing *for*
Financial Services
Summit** CANADA

JUNE
6-7, 2023
TORONTO

3

5th Annual
**Digital Marketing *for*
Financial Services
Summit** MIDWEST

OCTOBER
3-4, 2023
CHICAGO

4

10th Annual
**Digital Marketing *for*
Financial Services
Summit** NEW YORK

NOVEMBER
1-2, 2023
NEW YORK

- The **largest** and **longest-serving portfolio** of digital marketing for financial services events in North America for more than **13 years**
- **4 annual conferences** that solidify our reputation as a leader in the financial marketing space
- **10,000+ decision-makers** in our DMFS community of **senior-level** buyers
- Events attended by **CMOs, VPs** and **Directors** from top financial organizations that are looking to elevate their digital marketing
- Hybrid event platform gives you access to the **biggest names in financial marketing globally**
- **Immersive conference format** to showcase your brand in an environment with in-depth engagement



HOW WE DELIVER ATTENDEES

- The premier financial marketing event series with a **strong grasp on the market** and a deep understanding of its needs
- **World-class speakers** and **leading-edge content** attract new buyers to the summit and encourage past delegates to return
- Results-driven delegate sales team **dedicated to securing your top prospects**, target companies and verticals
- **Vetted attendees** to prioritize seniority and relevance, including targeting senior executives for our VIP program, while capping sponsors to ensure the event remains unsaturated
- Active in the digital marketing for financial services field **year-round** with our finger on the pulse of **new trends** and the sector's biggest players
- Multichannel **targeted marketing campaign** to our DMFS community, including social media, paid digital, thought leadership content, personalized emails, an event website and brochure

TOP REASONS OUR DELEGATES ATTEND



Source new technology partners



Gain best practices and industry benchmarking



Experience product demos



Engage with peers face to face and virtually



Connect with current solution providers



Test drive new technology



Meet thought leaders and visionaries



Network with industry stakeholders



Stay on top of market trends and innovations

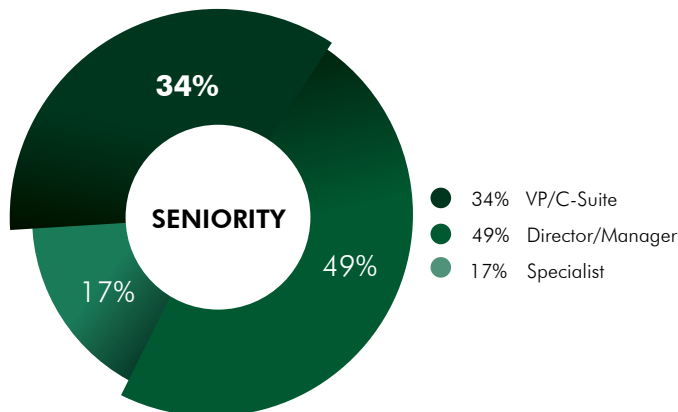
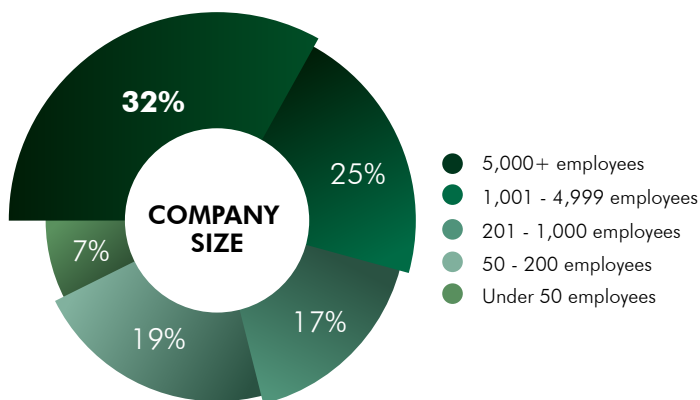
8th Annual

Digital Marketing *for* Financial Services Summit WEST

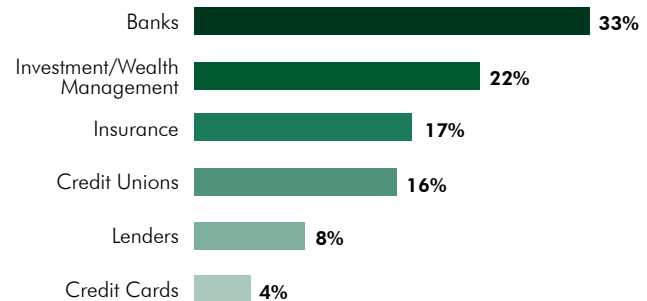
 APRIL
 26-27, 2023
 SAN FRANCISCO

The only event series targeting financial marketers in the West

This exclusive conference attracts **financial services decision-makers** in the West who are actively looking for solutions to advance their digital marketing.



MARKET SEGMENTS



KEY METRICS



Director+
qualified leads



64%
of attending
companies generate
\$100M+ in revenue



57%
of attending
companies have
1,000+ employees



PAST SPEAKERS



Ann Handley
Chief Content Officer &
Bestselling Author
MarketingProfs



Ravi Misquitta
SVP, Marketing Strategy
& Technology
Franklin Templeton



Sayeed Sanaullah
SVP, Corporate Strategy
& Development
Wells Fargo



Maja Neable
SVP & CMO, Banking and
CDAO, Marketing
BMO Financial Group



Robert Rose
Chief Strategy Advisor
**Content Marketing
Institute**



Brock Dubbels
VP, Experience Design
& Innovation
Bank of America



Eileen Loustau
SVP, Head of Marketing (CMO)
**Chevron Federal
Credit Union**



Deborah Mersino
CMO
**Oregon Community
Credit Union**

PAST ATTENDEES



Vanguard

TRUIST



Allstate



PIMCO



PAST SPONSORS



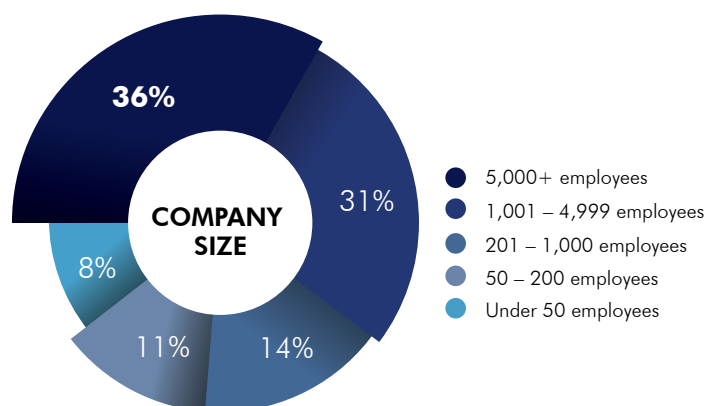
13th Annual

Digital Marketing for Financial Services Summit CANADA

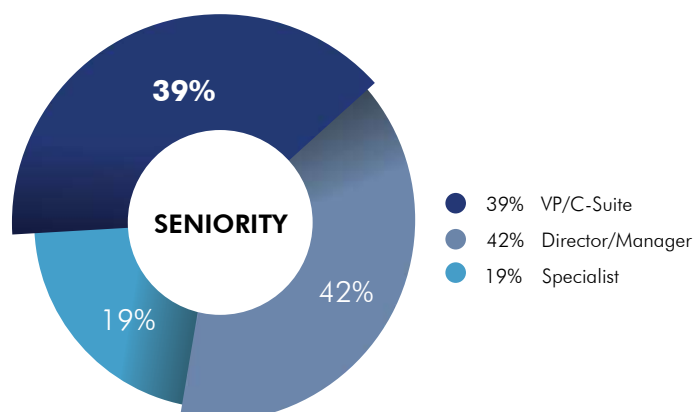
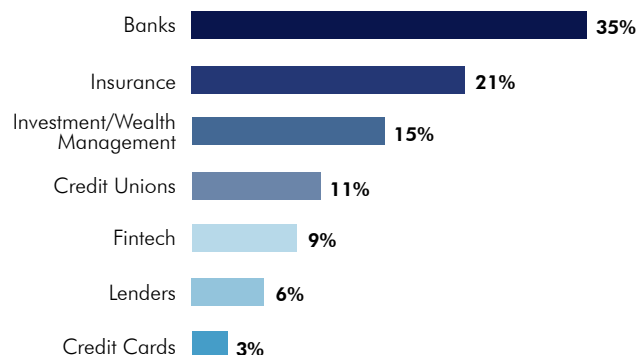
June
6–7, 2023
Toronto

Canada's largest and longest-running digital marketing for financial services event series

This flagship Canadian conference attracts **financial marketers** actively looking to invest in solutions to transform their digital engagement.



MARKET SEGMENTS



KEY METRICS



Director+
qualified leads



77%
of attending
companies generate
\$250M+ in revenue



67%
of attending
companies have
1,000+ employees



PAST SPEAKERS



Betsey Chung
SVP & CMO, Canada and Global
Digital Marketing Officer
TD Bank



Alan Depencier
CMO, Personal, Commercial
Banking & Insurance
RBC



Renu Sihra Sehmi
Head of Enterprise Digital
Marketing Operations
Scotiabank



Andy Taylor
President & CEO
Gore Mutual Insurance



Soumia Zehri
Director, Digital
Marketing & Growth
National Bank of Canada



Matthew Bennett
Head of Growth &
Performance Marketing
Tangerine Bank



Maurice Cacho
Director, Digital Marketing
Fidelity Investments Canada



Kobi Gulersen
VP, B2B, Product &
Partner Marketing
Mastercard Canada

PAST ATTENDEES



PAST SPONSORS



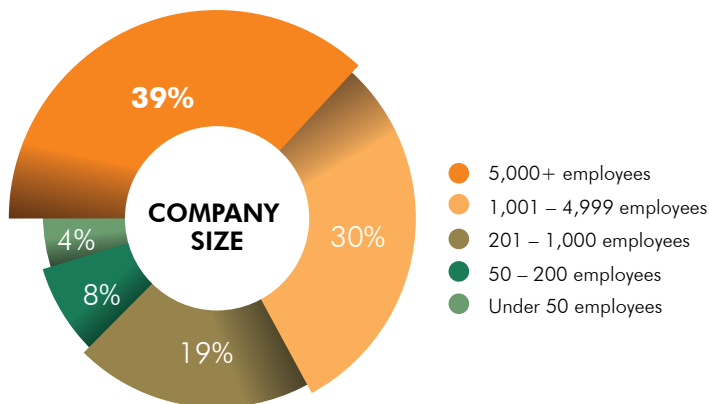
5th Annual

Digital Marketing *for* Financial Services Summit **MIDWEST**

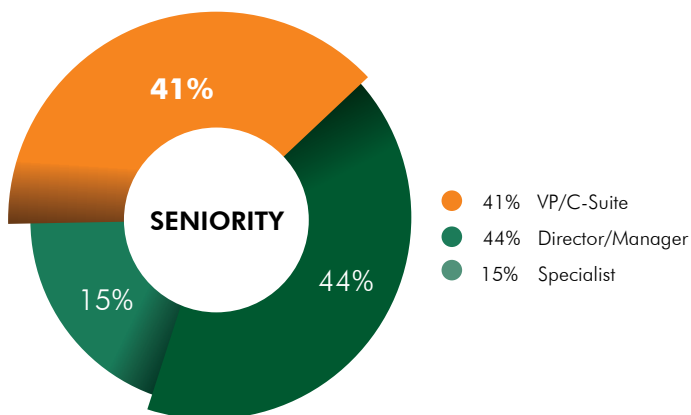
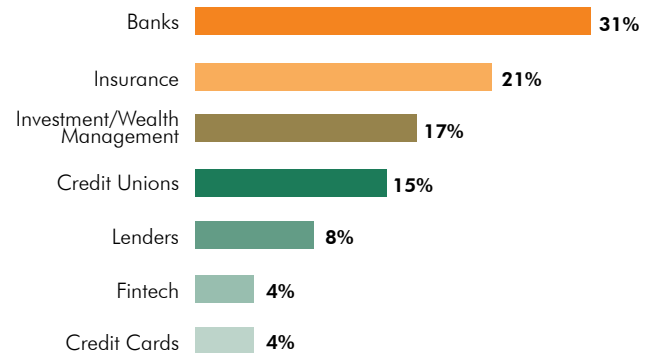
OCTOBER
3-4, 2023
CHICAGO

The premier digital marketing
event series for financial leaders
in the Midwest

This highly anticipated conference connects top solution providers
with **financial marketing innovators** in the Midwest.



MARKET SEGMENTS



KEY METRICS



Director+
qualified leads



70%
of attending
companies generate
\$250M+ in revenue



69%
of attending
companies have
1,000+ employees



PAST SPEAKERS



Koley Corte
SVP & Global Head of
Business Transformation
AllianceBernstein



Matt Beckman
VP, Digital Platform Optimization &
Digital Lifecycle Marketing
U.S. Bank



Donna Doleman Dickerson
CMO
**GreenPath Financial
Wellness**



Megan Audette
Senior Director, Integrated Marketing,
Advertising & Social Strategy
Ally Bank



Amit Pandya
Director, Head of Digital
Strategy & Platforms
**New York Life
Insurance Company**



Susan Mandarino
VP, Marketing
**Mutual Credit
Union**



Vickie Sherman
SVP & Director,
Integrated Marketing
Mechanics Bank



Julissa Bonilla
AVP, Digital Marketing, Digital
Platform Field Engagement & Adoption
Morgan Stanley

PAST ATTENDEES



PAST SPONSORS



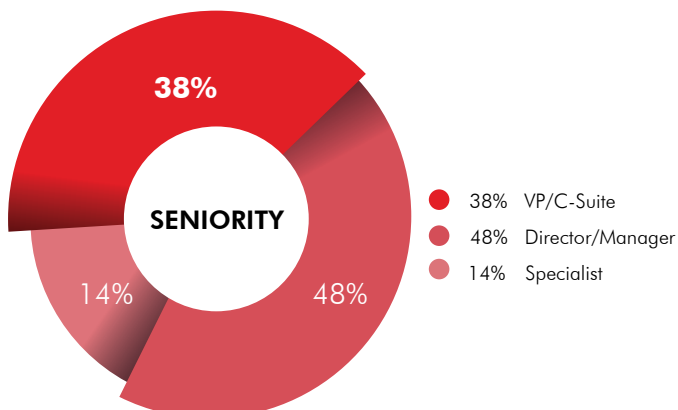
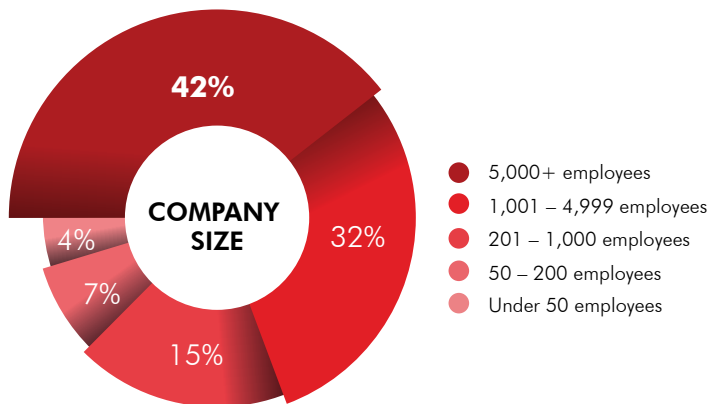
10th Annual

Digital Marketing for Financial Services Summit **NEW YORK**

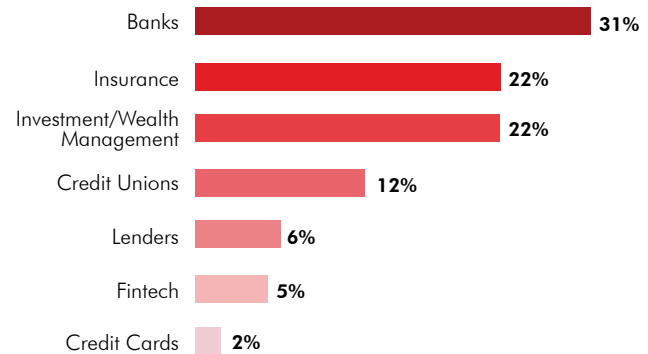
NOVEMBER
1-2, 2023
NEW YORK

The largest and longest-running digital marketing for financial services event series in the United States

This innovative conference attracts **financial services executives** actively looking to invest in solutions to enhance their marketing and branding campaigns.



MARKET SEGMENTS



KEY METRICS



Director+
qualified leads



66%
of attending
companies generate
\$250M+ in revenue



74%
of attending
companies have
1,000+ employees



PAST SPEAKERS



Alex Sion
Head of Global Consumer
Banking, Citi Ventures
Citi



Amy Hu
SVP & CMO
New York Life
Insurance Company



Rich Smith
Chief Product &
Marketing Officer
PenFed Credit Union



David Femi
SVP, Head of Multicultural
Banking & Diverse Market Strategy
M&T Bank



Amresh Mathur
SVP, Head of Digital Acquisition
& Customer Experience
Citizens



Pam Piligian
SVP & CMO
Navy Federal
Credit Union



Brent Korte
SVP & CMO
Ameritas



Marianne Halvorsen
SVP
Aon

PAST ATTENDEES



PAST SPONSORS



SPONSOR TESTIMONIALS

“

We've participated both in Canada and the U.S. and will continue to do so ... Everyone here is someone who is very highly engaged in marketing, very highly engaged in digital, and they're all interested in getting to that next stage.

 **Hootsuite**

“

The event went wonderfully! Our speaking session helped us showcase our solutions to the right audience. We had potential prospects reach out immediately after and ask to meet for more information. Some of these turned into opportunities, and we connected them with our sales rep before the end of the day!

 **zendesk**

“

I think the quality of people is fantastic. I had a lot of great conversations and a lot of great leads for us to be calling on.

 **Broadridge**

“

Good experience overall with lots of foot traffic at our booth and great opportunities to network. The process of scanning leads with QR codes was fantastic and the attendee list was also very valuable! Loved the presentation setup and booth positioning. Interesting sessions with good speakers.

 **sas**

“

Great event for any organization looking to raise their profile and reach a target audience in the financial service sector!

Phase5.

“

It's clear that this is the right audience for us. They are really engaged in the kinds of challenges that we are engaged and focused on.

 **Demandbase.**

“

My company works directly in the digital marketing content space. The attendees are relevant, speakers are relevant, dialogue's been relevant.

 **NewsCred**

BENEFIT FROM AN **IN-PERSON** AND **VIRTUAL** EVENT

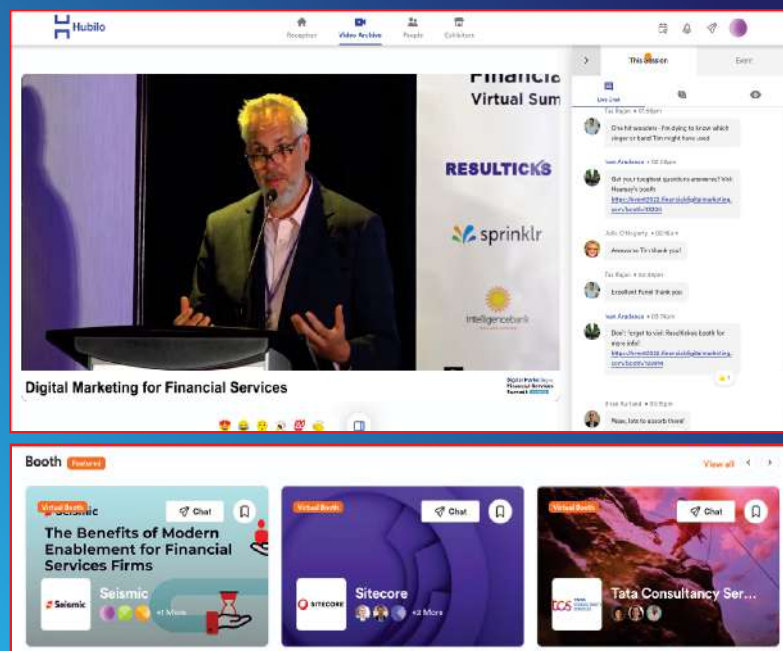


In-Person

LEVERAGE THE BEST OF BOTH WORLDS

This hybrid experience is specially designed to help sponsors capture the most value possible!

- Maximize your lead generation with access to a **larger audience** and a broader reach of attendees.
- Enhance your ability to meet with prospects through virtual networking **before, during** and **after** the conference on the event platform.
- Connect with clients **in person** and **virtually** through multiple avenues of **engagement**.
- Extend the reach of your thought leadership and boost lead capture with **on-demand speaking sessions** and downloadable content.
- Target your ideal buyers with the help of matchmaking tools, **detailed attendee profiles** and filters.
- Double the impact of your brand awareness and recognition with both an **in-person** and **virtual exhibit booth**.



Virtual

SECURE YOUR SPOT NOW

**Book a call to learn
how this opportunity
can help you generate
new leads and increase
your pipeline!**



Darren Haughian

Sponsorship Director

Call: 1-866-298-9343 x 276
darren@strategyinstitute.com



4th Annual
Digital Marketing *for*
Financial Services
Summit **WEST**

APRIL
26-27, 2023
SAN FRANCISCO
www.financialdigitalmarketingwest.us

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Summit **MIDWEST**

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10th Annual
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Summit **NEW YORK**

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