

14th Annual

Digital Marketing *for* Financial Services Summit

CANADA

June 11 & 12, 2024

Hyatt Regency Hotel Toronto
Toronto, Ontario

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



A distinctive immersive experience that includes:



Speaker Preview



Scott Spidell
VP Marketing Strategy
First Command Financial



Ara Jaingue
First Vice President
MarTech & Omnichannel
Axos Bank



Nikhil Mahendra
Vice President and
Head of Digital
**RBC Global Asset
Management**



Martin Cyrenne
Vice President
North American
Digital Marketing
**Mitsubishi HC Capital
Canada**



Claire Kurlmel
Director
Channel Marketing
Parnassus Investments



Stefanie MacLeod
VP, Marketing
Copperfin Credit Union



Idriss Bouhmouch
Digital Partnerships Lead
National Bank of Canada



Leanne Nullmeyer
Director Marketing &
Brand Experience
IG Wealth Management



... AND MANY MORE!



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— CANADA —



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neo



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AGENDA - DAY 1

Tuesday, June 11th, 2024

7:45 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **digital marketing leaders**.
- 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.

9:00 AM OPENING KEYNOTE: STATE OF THE FINANCIAL SERVICES MARKET

The Emerging Financial Services Customer - Plan for Your and Their Future

As digital marketing enters a new era, unpack the market outlook for the next 12 months and beyond. Learn why a key factor in your strategic success hinges on understanding the macro marketing environment. Create a roadmap to:

- Optimize your understanding of shifting audience expectations to leverage emerging trends
- Secure a larger market share by understanding key marketing drivers including modelling, attribution, and building a digital roadmap
- Pinpoint areas of potential revenue growth for the upcoming year

Bolster your holistic digital marketing plan to achieve success and stay ahead of the curve.

9:30 AM POWER PANEL: TOP 10 ROI STRATEGIES IN THE AGE OF UNCERTAINTY

Innovation in Marketing and Customer Experience in the Age of Turbulence

In a world where digital marketers are under pressure to achieve more with fewer resources, leading executives are focused on maximizing the effectiveness of their marketing strategies, ensuring they yield tangible results. Find out in this insightful presentation how top financial service companies can thrive in uncertain times. Discover how you can:

- Accelerate growth during these times and maintain a strategic mindset
- Persuade your C-suite that they must lean into customer experience and marketing investments, even when the going gets tough
- Create a clear path of what your customers want and leverage data and analytics to get better
- Discover why economic turbulence should be an essential part of your

digital growth and marketing strategy

Master your marketing strategy and align your resources to significantly increase ROI.

10:00 AM INDUSTRY EXPERT: GAINING THE EDGE FROM DIGITAL PLATFORMS

How to Double Your Digital Marketing Capability with Platforms

Developing a structured and substantiated view of the value that data can generate for the company -and a road map to achieve it. Digital Platforms and Cloud migration is the way forward for many financial services companies, but the route to success can be fragmented and muddled. This session presents a framework to help companies navigate the complex cloud landscape effectively. Answer your key questions on how to thrive on the cloud platform frontier:

- Which parts of your core digital marketing should be moved to a digital platform: business apps, customer-facing apps, and data and analytics capabilities
- Overcoming challenges in standardizing IT processes, security and marketing alignment
- Where are data platforms not the answer? What are the alternatives including legacy IT

Choosing the right digital marketing platform to enhance your business speed and success

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 experts and **gain invaluable support**.

11:00 AM AI LEADERSHIP PANEL

Now It's Here! Preparing for an AI & Emerging Tech Revolution

As AI takes center stage in the industry, questions remain about how to unlock its full potential. While it has the potential to revolutionize, it also raises significant concerns around privacy, including data use and security. Understanding accountability is a central business concern, and there is an ongoing need to educate corporate boards and executive teams on compliance, prevention, data and crisis preparedness. Adopt best practices to:

AGENDA - DAY 1

Tuesday, June 11th, 2024

- Leverage insights from the forefront of marketing thought leadership on AI and its transformative impact on your marketing strategies
- Mitigate hidden risks, including discrimination or disclosure, so unseen pitfalls don't derail your marketing activities
- Bolster your content production with AI, giving you more time to think critically and strategize for your customers

Transform your AI strategy into a leading-edge one that can skyrocket productivity.

11:30 PM CASE STUDY: EFFECTIVE USE OF AI

A Case Study on Marketing Messaging: Challenges, Pitfalls & Opportunities

Marketers are actively exploring how to effectively integrate AI into their strategies, but it's crucial to know what kind of research will guide your efforts. Learn from JP Morgan's approach, understanding the types of questions they asked, and how you can adapt them for your business. Walk away with an action plan to:

- Adapt and modify your models to detect anomalies and eliminate the risk of misinformation
- Streamline your questions to focus on essential information, reducing unnecessary details and potential loss in quality
- Recognize AI's potential as a powerful translator, enabling the use of templates in the primary language to rapidly adapt content for international audiences

Improve your ability to research and implement new technology to expand your market share.

12:00 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest 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.**

1:00 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.

TRACK 1: USING AI TOOLS

1:15 PM AI LEADERSHIP PANEL: BANKING ON AI FOR COMPETITIVE ADVANTAGE

Reinventing Customer Interactions: Learn How Digital Marketing Leaders Deploy AI For Maximum Impact

To stand out in this saturated landscape and maximise the impact of their advertising budgets, leading digital marketers in FS are considering using conversation intelligence AI. However, while digital marketers are keen to invest in new AI technologies, they're still facing barriers to adoption. New AI technology isn't without its risks around privacy and financial regulations. There are also deep integrations to consider with legacy systems. Find out the pros, cons and everything inbetween in this deep dive panel:

- Overcoming key objections – from data security concerns to retraining and implementation costs
- Chatbot and Chatspot tools – personalizing the customer experience
- AI writing and content creation tools from Copilot to ChatGPT
- AI advertising and SEO tools
- Where does the human part all fit in?

Find out how to get the most out of AI's constantly evolving technology

TRACK 2: DIGITAL MOBILE BRANDING

1:15 PM PANEL: MOBILE BRAND ENGAGEMENT

How to Get Your App on the Mobile Home Screen & the Convenient 'Go To' tap

Securing a place on the home screen of a device is the ultimate goal for app placement, but it's a challenging feat. Master your ability to regularly be top of mind for your client. Take away specific solutions to:

- Transform your application strategy, keeping customers in your ecosystem and driving revenue growth
- Master the art of enhancing brand equity, leading to a substantial increase in engagement rates Improve your bottom line by maintaining your marketing efforts in-house, allowing for greater customization at a significantly reduced cost

Adapt your application strategies to increase brand equity with your existing customers.

AGENDA - DAY 1

Tuesday, June 11th, 2024

TRACK 1: CUSTOMER RETENTION

1:45 PM FIRESIDE CHAT: Developing Privacy: Personalize Your Customer Engagement to Increase Your Customer Retention

As technology becomes more prevalent, there's a risk of losing the personal touch that banking once provided. Your strategy should return to these foundational principles to maintain a strong connection with your customers. Take back to your office strategies to:

- Improve customer trust by engaging thoughtfully and consistently with your customers across all communication platforms
- Build a company culture centered on empathy and care
- Reduce the depersonalization that can result from online marketing

Optimize genuine personal engagement to retain your customers and attract new ones.

TRACK 1: DATA MODELLING

2:15 PM INDUSTRY EXPERT: Forecasting Uncertainty: Excel Modelling to Overcome Data Limitations

Data is the backbone of effective decision-making, but scarce or unreliable data can make it difficult to forecast effectively in an industry that is constantly changing. While

TRACK 2: MARTECH DECISION-MAKING

1:45 PM FIRESIDE CHAT: Keeping Up with Martech and Staying at the Forefront of Marketing Excellence

Keeping Up with Martech and Staying at the Forefront of Marketing Excellence

Adapting to rapidly evolving technology is undoubtedly getting more challenging. Mastering your ability to maintain a competitive edge will provide serious potential to capture a significant share of the market. Develop a blueprint to:

- Advance your knowledge of available marketing technology
- Improve your ability to seamlessly integrate upcoming technology into your marketing strategy
- Reduce pitfalls and traps such as ineffective technology or wasteful utilization

Achieve marketing excellence by adopting new technology to stay ahead of the curve

TRACK 2: AI TOOLS

2:15 PM INDUSTRY EXPERT: AI & Targeting: How to Increase Market Share in Your Sector

Although AI adoption may raise concerns, it can be a valuable tool for investment managers looking to refine their audience targeting. Understand how AI can bolster your targeting efforts and boost lead

no marketer can predict the future, we all want to create actionable and defensible forecasts, especially when budget and/or historical data is limited. This case study will show how incorporating uncertainty variables into your statistical models can mitigate risks associated with external market events, shifting consumer preferences, untested channels or new strategic initiatives, and the inflationary rise of marketing costs in 2024. Gain access to customizable Excel tools and practical tips to:

- Recognize how uncertainty can affect your company's strategic objectives and select the appropriate variables to consider.
- Transform your predictive capabilities with data-driven models that control for uncertainty, giving more clarity around future potential outcomes.
- Increase confidence in your marketing and business KPI forecasts through multi-iteration sensitivity analyses.

Optimize your forecasting approach to generate a better picture of your marketing outcomes

generation. Source your plan of action with:

- Perfecting your boundary creation to ensure that your potential market share can readily access your messaging Mitigate the risks of unintentional disclosure and other unforeseen pitfalls Stay ahead of potential regulatory changes to avoid wasting resources on unnecessary adjustments

Advance your AI targeting approach to increase your standing in the market.

2:45 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 FIRESIDE CHAT: PERSONALIZATION

Providing the 1-2-1 Service Digitally to Increase Customer Engagement

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In an era where technology excels at personalization, the human touch has never been more important, but questions remain on how to construct that experience. Optimize your strategy to achieve greater personalization while reducing costs. Source practical tips to:

- Link different types of data together, such as travel and payment information, to create a seamless customer experience
- Identify customer preferences and needs to ensure that personalization genuinely enhances their experience Perfect the integration of data sources to enable seamless communication and trigger actions across different touchpoints

Master your digital personalization to elevate your levels of engagement and increase ROI.

3:45 PM INDUSTRY EXPERT: OPTIMIZING DIGITAL SPEND

Attributing Success and Maximizing Budget Efficiency

Attributing success to your own marketing performance, or to competitors' changes, has become increasingly complex in challenging economic conditions. Improve your ability to clarify and attribute your marketing success correctly. Master the success factors to:

- Refine your geographical reach, ensuring that every dollar spent yields a tangible return on investment
- Optimize your spending and tactics mix to effectively allocate resources

Identify underperforming markets by temporarily reducing or discontinuing activities in specific areas, establishing a benchmark against which you can measure marketing performance

Advance your marketing success attribution strategies to enhance budget efficiency.

4:15 PM PLENARY PANEL DISCUSSION: EMBRACING 'THE SUCK'

Best Practices in Learning from Successes and Failures

Not all marketing campaigns succeed, but understanding the reasons behind both success and failure is crucial to prevent the repetition of mistakes. Reduce your likelihood of wasting time and resources through a key actionable case study. Adopt best practices to:

- Recognize the signs of a failing marketing strategy and learn how to mitigate its internal and external impact
- Heighten your ability to turn a challenging situation around by identifying successful elements and eliminating those that have proven ineffective
- Develop a culture of continuous learning, where failure serves as a valuable stepping stone on the path to success

Optimize your approach by learning from your recent marketing experiences to save time and resources.

4:45 PM CLOSING KEYNOTE: Standing Out In the Crowd: Be Distinctive to Increase Your Audience Engagement

In a saturated market, achieving differentiation is a critical factor for marketing success, but how can you establish that distinctiveness? By recognizing your Unique Selling Proposition (USP), such as the localization aspect compared to larger competitors, you can enhance your credibility in the eyes of your customers. Take away specific solutions to:

- Clearly define your USP and its essence, providing a competitive advantage
- Understand why a simple USP like localization can set you apart from larger competitors
- Transform your USP into tangible income from your target audience

Perfect your USP to increase viewership and drive sales.

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!

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 San Francisco nightlife has to offer. Just be sure to set your alarm for Day 2!

6:20 PM CONFERENCE ADJOURNS TO DAY TWO

AGENDA - DAY 2

Wednesday, June 12th, 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.

8:45 AM OPENING COMMENTS FROM YOUR HOST

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9:00 AM OPENING KEYNOTE: CAPTURING THEIR ATTENTION!

Secure New Customers and Re-engage with Your Existing Customers

Amid significant technological changes and the potential for substantial growth, navigating economic challenges requires a deep understanding of how to captivate your audience across various channels. Maximize your ability to position yourself in front of and maintain the attention of your target market. Achieve a step-by-step action plan to:

- Understand what the market demands and how you can deliver value
- Excel at recognizing the elements that seize attention and compel customers to engage with your brand
- Combine these insights to build a flawless marketing plan

Amplify how you capture attention to attract new customers while retaining your existing ones.

9:30 AM MARKETING LEADERS PANEL: MARKETING TO GEN X, MILLENNIALS & GEN Z

Build Brand Engagement and Loyalty with the Next Generation

While Gen X & Z are recognized for spending the most time on social media, establishing trust with them remains a challenge. Transform your Gen X & Z strategy to develop authentic connections with this demographic, positioning your organization for success with the next generation. Adopt best practices to:

- Advance your understanding of what resonates with Gen X & Z and leads them to trust a brand
- Improve your content marketing, prioritizing genuine connections and adding value in your engagements
- Amplify your brand's beliefs and values over product features, using influencer marketing to endorse those values

Master your Gen X & Z marketing strategy to strengthen trust and position your brand as a trusted and influential choice for the next generation.

10:00 AM INDUSTRY EXPERT: MARKETING TO AN OLDER, WEALTHIER AUDIENCE

Capture and Convert Your Most Valuable Customer Group

As customers age and accumulate wealth, their needs and priorities may shift, particularly with the prospect of retirement. Enhance your ability to effectively communicate with those undergoing this transition, thereby increasing revenue potential. Source practical tips to:

- Offer products and services that align with the evolving desires of older customers, such as wealth management, healthcare, and life insurance. Adapt the timing of your marketing strategy to ensure that the right product is presented to the customer at the right time
- Recognize the limitations of older generations, like unfamiliarity with platforms such as TikTok or VR, to allocate resources more efficiently

Heighten your audience knowledge to increase revenue from the right kind of customer.

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 experts and gain invaluable support.

11:00 AM PANEL: FOSTERING TRUST: PROTECT AND IMPROVE YOUR REPUTATION IN THE MARKET

Cybersecurity plays a vital role in digital marketing, ensuring the protection of your brand's reputation and building trust with customers. Minimize your vulnerability to cyber threats, thereby bolstering the perception of your brand as safe and secure. Develop a blueprint to:

- Protect your social media accounts to maintain the trust of customers in your marketing messaging
- Strengthen your reputation in the eyes of current and potential customers
- Avoid the gruelling process of rebuilding trust, maintaining the loyalty of existing customers and making a positive impression on potential ones

Bolster your cybersecurity framework to significantly increase brand reputation.

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11:30 AM CASE STUDY: PUTTING DIGITAL AT THE HEART OF OUR FUTURE MARKETING

Transforming Marketing Directions into Measurable, Profitable, Experience-led Growth

How can Financial Services brands and businesses ride out the storm of economic uncertainty and do the right thing ethically and commercially during these challenging times? Getting a clear growth aspiration and purpose, and a roadmap that links customer experience to value.

Get inspiring insights to:

- Aligning vision, mission and values with customers' needs and expectations
- Communicating effectively across all touchpoints
- Removing painpoints and building a roadmap for strong growth

Planning for success across a rapidly changing landscape: Using digital to drive memorable moments

12:00 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest 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**.

1:00 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZE

- 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.

TRACK 1: SOCIAL MEDIA

TRACK 2: DATA & INSIGHTS

1:15 PM PANEL: WHICH SOCIAL MEDIA PLATFORM IS BEST? MAXIMIZE YOUR CUSTOMERS ATTENTION & ENGAGEMENT

Social media is undeniably a pivotal marketing domain, but which platform suits financial services best? Transform your paid and

1:15 PM PANEL: COOKIES ARE GOING AWAY: RETAIN YOUR KNOWLEDGE OF YOUR CUSTOMER WITH NEW TRACKING METHODS

As cookies become less reliable in marketing, adopting new tracking methods is crucial for

organic social media strategies to significantly increase your engagement. Achieve a step-by-step action plan to:

- Master what type of content is needed for which platform, reducing your costs, and securing more customers
- Evaluate the pros and cons of TikTok and determine whether the newest social media platform aligns with your objectives
- Perfect your paid social media strategy to increase ROI and reduce budget waste

Heighten your social media strategy to boost engagement, capture more attention and drive higher conversion rates.

TRACK 1: SOCIAL MEDIA

1:45 PM HOW TO BUILD YOUR OWN ECOSYSTEM AND MONOPOLIZE CUSTOMER ATTENTION

As traditional media sources become harder to measure and more crowded, establishing your exclusive ecosystem where you are the sole marketing authority is imperative. Enrich your customers' experience by immersing them in your ecosystem, ensuring their undivided attention. Master the success factors to:

- Master what type of content is needed for which platform,

digital marketers to continue understanding their customers. Adapt your tracking capabilities and stay ahead of the competition when it comes to audience knowledge. Create a roadmap to:

- Excel in securing first party data, giving you more accurate and reliable customer data
- Optimize direct connections with customers, enabling you to ask candid questions and receive honest responses.
- Create a customer data platform that facilitates the processing of collected data

Improve your tracking methods to maintain a strong connection with your customers and gain deeper insights into their behaviour and preferences.

TRACK 2: DATA & INSIGHTS

1:45 PM CASE STUDY: SYNTHESIZING YOUR DATA INTO A RELIABLE REVENUE STREAM

Collecting data is the first step, but processing and extracting valuable insights from it is where the true challenge lies. Maximize your ability to identify meaningful patterns and narratives within your data and transform this knowledge into a tangible ROI by crafting more focused and relevant marketing campaigns. Develop a blueprint to:

- Highlight key manual and technological techniques for uncovering valuable insights

AGENDA - DAY 2

Wednesday, June 12th, 2023

reducing your costs, and securing more customers

- Evaluate the pros and cons of TikTok and determine whether the newest social media platform aligns with your objectives
- Perfect your paid social media strategy to increase ROI and reduce budget waste

Planning for success across a rapidly changing landscape: Using digital to drive memorable moments

digital marketers to continue understanding their customers. Adapt your tracking capabilities and stay ahead of the competition when it comes to audience knowledge. Create a roadmap to:

- within your data
- Accelerate your understanding of your customer base, identifying key marketing areas to exploit
- Reduce your reliance on clunky analytical software, enabling you to focus on reaching and converting your target audience.

Transform your data handling techniques to increase revenue and customer retention.

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.

2:45 PM PANEL DISCUSSION: CREATING CONTENT IN A HIGHLY REGULATED ENVIRONMENT: STAY COMPLIANT WITH YOUR REGULATORS

Financial services occupy a challenging position in the market, where customer demand for innovative marketing clashes with regulatory constraints that can hinder progress. Adapt your marketing innovation to align with potential forthcoming regulations. Take away specific solutions to:

- Heighten your ability to navigate regulatory changes and ensure your marketing meets all requirements
- Minimize delays in achieving regulatory compliance, increasing your speed to market
- Once in the market, excel at staying relevant and engaged with your customer base.

Improve your regulatory compliance approach to stay ahead of the competition and win market share

3:20 PM CLOSING KEYNOTE FIRESIDE CHAT: IN-HOUSE: MAXIMIZING TEAM COHESION TO DRIVE REVENUE & GROWTH

Building and nurturing an in-house team that rivals agencies in quality, without the same resources, can be a challenging endeavour. However, as agencies become more expensive and the desire to create internal ecosystems grows, optimizing your in-house team is essential to maximizing profits. Adopt best practices to:

- Champion projects to completion, maximizing ownership and overall quality
- Impact your staff with cross-training opportunities, enabling them to contribute to strategic decisions across the business. Achieve a comprehensive understanding of the sales process, making small tweaks to marketing processes that can yield substantial revenue results

Boost your internal team's cohesion to increase revenue and achieve your business objectives.

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.

4.05 PM CLOSING COMMENTS FROM YOUR HOST

“

“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

14th Annual

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

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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

Super Early Bird
Expires on March 8th

\$995 CAD

Regular Ticket

\$1,695 CAD

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:

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Super Early Bird
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\$795 CAD

Regular Ticket

\$1,395 CAD



**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:

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Sponsorship Manager
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E: darren@strategyinstitute.com

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

