



Digital Marketing *for* Financial Services

Portfolio of Events 2024

GROW YOUR
**FINANCIAL
SERVICES
MARKET
SHARE**

JOIN FORCES WITH NORTH AMERICA'S FINANCIAL MARKETING EVENT LEADER

2024 EVENTS

1

9th Annual
**Digital Marketing *for*
Financial Services
Summit** WEST

APRIL
17-18, 2024
SAN FRANCISCO

2

14th Annual
**Digital Marketing *for*
Financial Services
Summit** CANADA

JUNE
11-12, 2024
TORONTO

3

6th Annual
**Digital Marketing *for*
Financial Services
Summit** MIDWEST

OCTOBER
9-10, 2024
CHICAGO

4

11th Annual
**Digital Marketing *for*
Financial Services
Summit** NEW YORK

NOVEMBER
7-8, 2024
NEW YORK

- The **largest** and **longest-serving portfolio** of digital marketing for financial services events in North America for more than **14 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** showcases 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 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

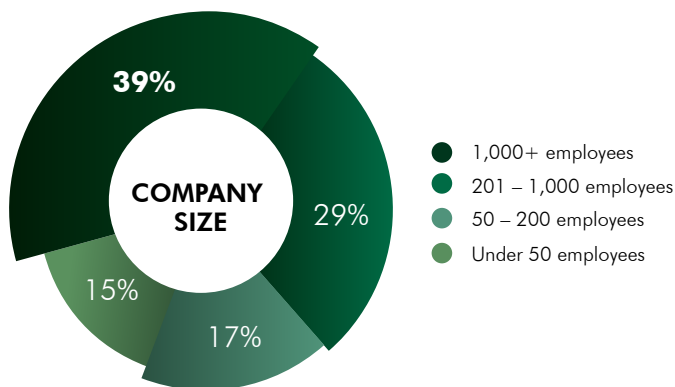
9th Annual

Digital Marketing *for* Financial Services Summit WEST

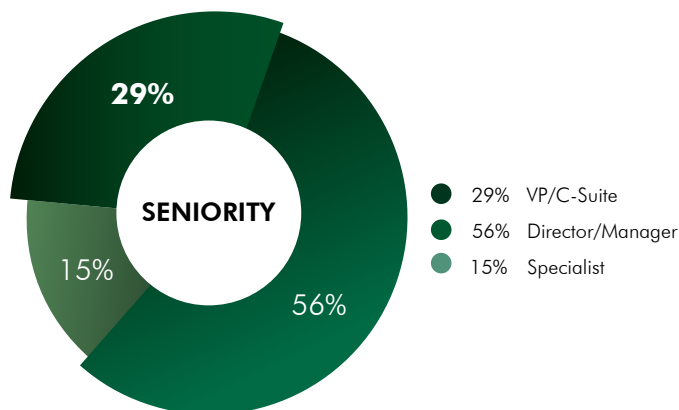
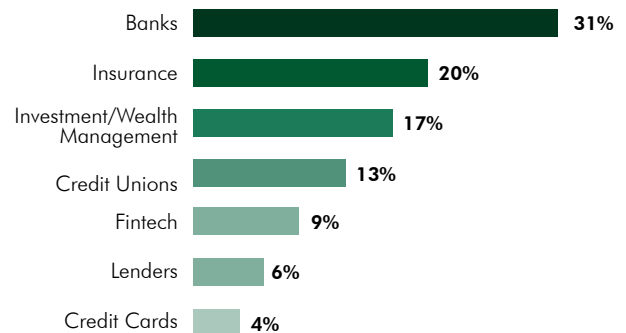
APRIL
17-18, 2024
SAN FRANCISCO

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


62%
of attending
companies generate
\$100M+ in revenue

CONTINUED PAST SPEAKERS, ATTENDEES AND SPONSORS...



PAST SPEAKERS



Maha Madain
Chief Marketing Officer
Santander



Ravi Misquitta
SVP, Marketing Strategy
& Technology
Franklin Templeton



Sayeed Sanaullah
SVP, Corporate Strategy
& Development
Wells Fargo



Nidhi Daga
SVP, Growth, Digital Platform
J.P. Morgan



Ben Stuart
Head of US Marketing Strategy & Integration
BMO Financial



Jackie Buonassisi
VP, Omnichannel Group
U.S. Bank



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



Kevin Plumberg
Head of B2B Content
Marketing, Bank of the West
BNP Paribas

PAST ATTENDEES



PAST SPONSORS



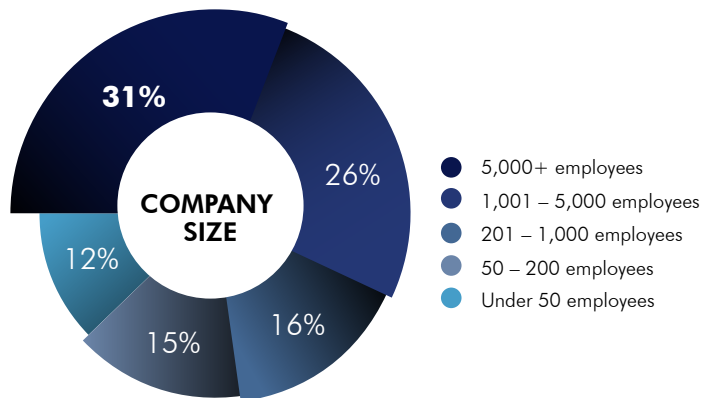
14th Annual

Digital Marketing for Financial Services Summit CANADA

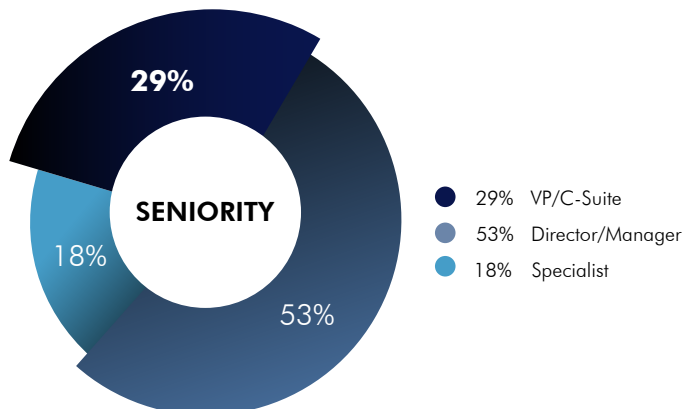
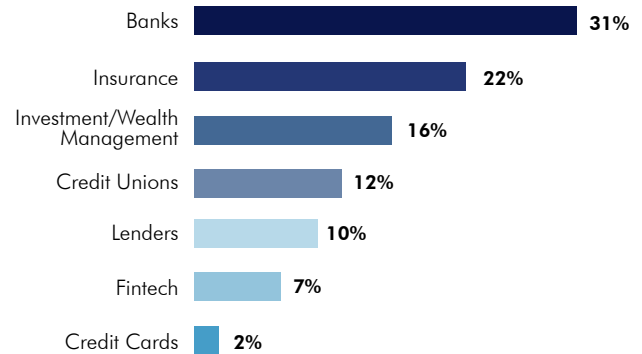
JUNE
11–12, 2024
TORONTO

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


63%
of attending
companies generate
\$250M+ in revenue


57%
of attending
companies have
1,000+ employees



PAST SPEAKERS



Betsey Chung
SVP & CMO, Canada & 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



Eugene Wen
VP, Group Advanced Analytics
Manulife



Maurice Cacho
Director, Digital Marketing
Fidelity Investments Canada



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

PAST ATTENDEES



PAST SPONSORS



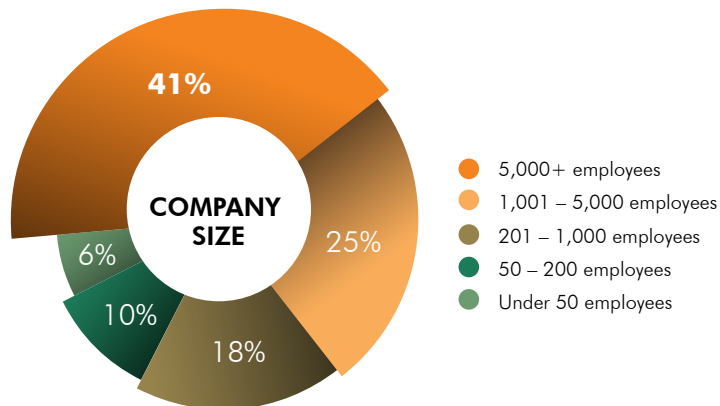
6th Annual

Digital Marketing *for* Financial Services Summit MIDWEST

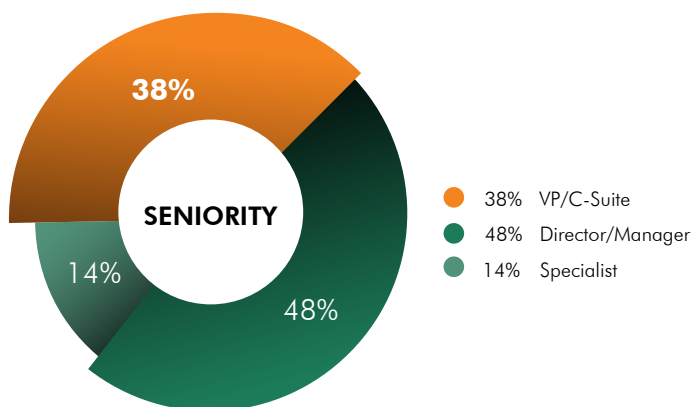
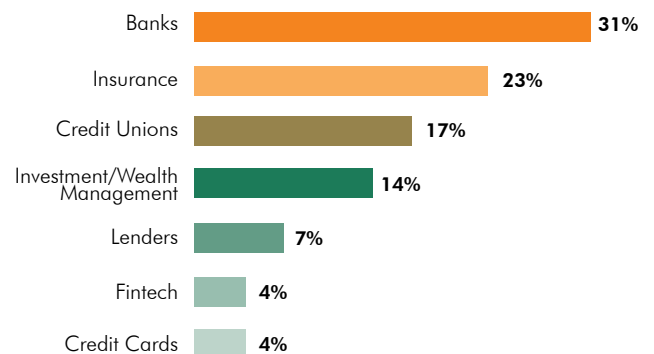
OCTOBER
9-10, 2024
CHICAGO

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


68%
of attending
companies generate
\$100M+ in revenue


66%
of attending
companies have
1,000+ employees



PAST SPEAKERS



Koley Corte
SVP & Global Head of
Business Transformation
AllianceBernstein



David Partain
SVP & Global CMO, FlexShares ETFs
Northern Trust
Asset Management



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



Vijay Konduru
EVP & CMO
Huntington
National Bank



Monu Kalsi
VP, Marketing
CNO Financial Group



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



Nathan Rivera
Second VP, Digital
Channels & Products
Ameritas



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

PAST ATTENDEES



PAST SPONSORS

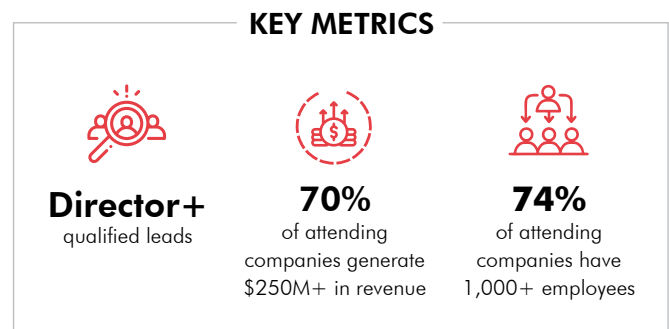
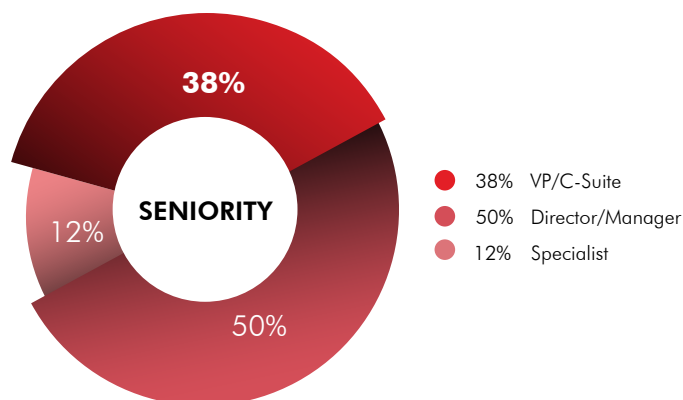
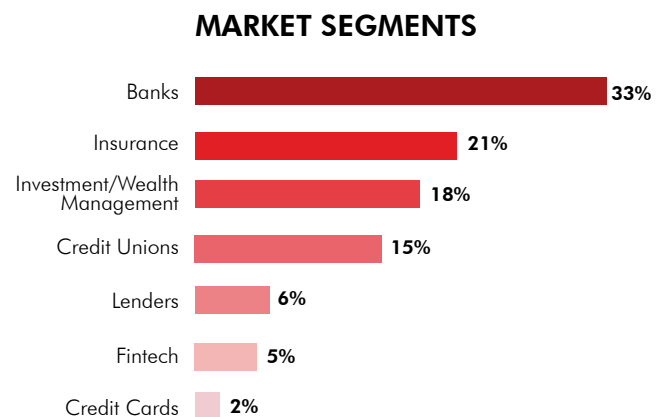
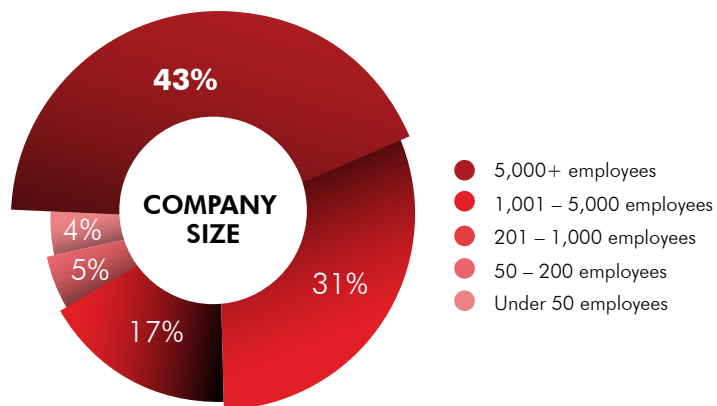


11th Annual
Digital Marketing for
Financial Services
Summit NEW YORK

NOVEMBER
7-8, 2024
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.





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



Bjorn Austraat
SVP & Head of AI Acceleration
Truist



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



Brent Korte
SVP & CMO
Ameritas



Jaime Kalfus
Head of Global Brand
Development & Engagement
PGIM



Susan Grossman
EVP, Marketing Services
Mastercard

PAST ATTENDEES

J.P.Morgan

Goldman Sachs

Morgan Stanley

Prudential

BANK OF AMERICA

Apple Bank

Edward Jones

WOODRUFF SAWYER

PennMutual

M F A

DISCOVER
FINANCIAL SERVICES

Blackstone

BNY MELLON

MORNINGSTAR

Capital One

IGM

Liberty Mutual
INSURANCE

STATE STREET

PAST SPONSORS

tcs
TATA CONSULTANCY SERVICES

Adobe

Seismic

ceros

SITECORE

vidmob

moengage

Optimizely

Demandbase

ACQUIRE

SAS

Amplitude

outlier

maru

hearsay

NewsCred

Contently

GLASSBOX

adverity

Broadridge

Contentsquare

Nielsen

SPONSOR TESTIMONIALS

“

This is our third DMFS and has probably been our best to date. Every event seems to get better than the one that proceeds it. Certainly feels like feedback is being heard and acted upon! The attendance and engagement was high, and delegates were interested in learning more about us ... In-person networking was great, everyone was approachable and able to have deeper conversations ... Communication leading up to the event was also great. I had all the information I needed and ready to go coming to the start of the conference.

IQUANTI

“

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**

“

First time we attended. Very refreshing. Great experience. Lots of new connections ... Very good sessions. We learnt so much! ... The communication leading up to the event was spot on.

SITEPLUG

“

Great event for any organization looking to raise their profile and reach a target audience in the financial service sector! Well organized conference. Good networking opportunities. Clear communication and organization. Interesting content ... It was amazing working with the entire DMFS event staff.

Phase5

“

Very positive. Everything ran seamlessly ... We were able to mingle with lots of attendees! ... Happy hour and roundtables were perfect ... This was a great experience.

 **Red Marker**

“

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 leads! As an account executive these conversations are key to our business.

 **SITECORE**

YOUR SPONSORSHIP PACKAGES



GOLD

- One of our most prestigious sponsorship opportunities with a **premium slot on the agenda** and **maximum exposure**.
- It features a **30-minute speaking session** as well as a fully branded in-person and virtual exhibit booth.
- The package also includes:
 - A comprehensive brand awareness and co-marketing campaign to 10,000+ financial marketing buyers
 - Strategic onsite and pre-event positioning and branding
 - Access to the complete delegate and speaker list
 - 3 delegate passes for your team
 - 10 additional complimentary passes to invite your clients and prospects



SILVER

- The silver package provides the perfect opportunity to **demonstrate your brand's expertise on key themes important to the community**.
- It includes a speaking or moderating spot on a 30-minute panel as well as a fully branded in-person and virtual exhibit booth.
- The package also includes:
 - A comprehensive brand awareness and co-marketing campaign to 10,000+ financial marketing buyers
 - Strategic onsite and pre-event positioning and branding
 - Access to the complete delegate and speaker list
 - 3 delegate passes for your team
 - 10 additional complimentary passes to invite your clients and prospects

YOUR SPONSORSHIP PACKAGES



BRONZE

- Are your main sponsorship goals brand awareness and networking? The bronze package allows you to **display your products onsite and network with prospects face to face.**
- You are provided with a prime booth location to demo your products and access to all networking sessions onsite.
- The package also includes:
 - A fully customizable in-person and virtual exhibit booth
 - Comprehensive brand awareness and co-marketing campaign to 10,000+ financial marketing buyers
 - Strategic onsite and pre-event positioning and branding
 - Access to the complete delegate and speaker list
 - 2 delegate passes for your team
 - 10 additional complimentary passes to invite your clients and prospects



NETWORKING

- As an entry-level sponsorship opportunity, **get a feel for the seniority and relevance of our DMFS audience** with the chance to attend the event and leverage onsite branding.
- The package also includes:
 - 2 delegate passes for your team
 - Strategic onsite and pre-event positioning and branding through a co-marketing campaign

ADDITIONAL OPPORTUNITIES

TAILORED TO YOUR BUSINESS NEEDS

What better way to connect with potential prospects than through a host of engaging onsite activities or premier branding opportunities.



Roundtables



Exclusive Evening Reception



Conference Host



Breakfast Briefing



VIP Hosted Dinner



Exclusive Lanyards



Lunch & Learn



Wifi



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



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