

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**


**RSVP
TODAY**



A distinctive immersive experience that includes:



**RSVP
TODAY**



Workshops



Roundtables



Speed Networking

Speaker Preview



... AND MANY MORE!



Rajesh Panthri
VP, Analytics & Insights
Fidelity Investments



Amisha Parikh
VP, Product Strategy, Cyber
& Intelligence Solutions
Mastercard



Avinash D'Souza
VP Product Marketing
Global X Canada



Steven Matt
Global Vice President
Marketing Operations,
Channels, and Analytics
MetLife



Matthew Williams
VP
Goldman Sachs



Siddharth Vishwanathan
Head of Digital Acquisition
BMO



**Melissa (Marchesano)
Scheglov**
VP, Marketing
GreenShield Insurance



Kevin Chan
VP,
North American Marketing,
Analytics & Delivery
TD (former)



Victoria Nguyen
VP
CIBC



Rebecca Burgum
AVP, Marketing & Growth
Sunlife



Erin Wilson
VP, Marketing
Home Equity Bank



Ara Jaingue
First Vice President
MarTech & Omnichannel
Axos Bank

Speaker Preview



... AND MANY MORE!



Nilay Lad

Chief Product & Revenue
Officer
RBC



Dina Beaucage

VP, Marketing
Cambrian Credit Union



Leanne Nullmeyer

Director Marketing &
Brand Experience
IG Wealth Management



Idriss Bouhmouch

Digital Partnerships Lead
National Bank of Canada



Martin Cyrenne

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



Nikhil Mahendra

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



Davinder Singh

CMO
Borrowell



Martin Aubut

CMO
Nesto



Lois Tullo

Chief Revenue Officer
**Kuber Mortgage Investment
Corporation**



Taylor Vowell

Vice President
Member Growth
TDECU



Christy (Scott) Varicat

Director Marketing, CX and
Digital Transformation
Tangerine



Andrew Lo

President & CEO
Embark



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— CANADA —



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SUNRISE
CREDIT UNION

Tangerine™

Tower Hill
Insurance

WFG WORLD
FINANCIAL
GROUP



NATIONAL
BANK
OF CANADA

Fidelity
INVESTMENTS

CIBC

Who Attends?

BMO



AVIVA

VISA

usbank



Sun
Life Financial

Scotiabank

BLUE CROSS

neo



CapitalOne

Desjardins
Insurance

HSBC

LAURENTIAN
BANK

Manulife

Meridian™

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.

Elizabeth Walford, Founder & Managing Director, **Walford Partners**

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

Emerging Tech Trends in Financial Services

As digital transformation enters a new era, the tech-enabled financial services ecosystem has been changing the way end users interact digitally in their day-to-day life. Also, it has significant influence on how companies design products, enhance customer experiences and facilitate processes that improve business models and unit economics. Benchmark your own plans and create a sharper understanding of future growth opportunities in:

- Shifts in audience expectations and differences in their channel preference
- Measure key drivers including modelling, attribution and where digitization fits into your future roadmap.
- Pinpoint areas of potential revenue growth for the upcoming year

Create a sharper understanding of future growth opportunities & stay ahead of the curve.

Rajesh Panthri, VP, Analytics & Insights, **Fidelity Investments**

9:30 AM DIGITAL LEADERSHIP PANEL - EMERGING TRENDS IN DIGITAL TRANSFORMATION

Now It's Here! Prepare for Emerging Tech Revolution for Informed Decision Making

As digitization 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. Take away actionable strategies to:

- Integrate digital transformation and its transformative impact on your marketing and customer acquisition 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 digital transformation strategy into a leading-edge one that can skyrocket productivity.

Siddharth Vishwanathan, Head of Digital Acquisition, **BMO**
Joel Pomerleau, Director, Growth Marketing & Demand Generation, **BDC**
Steven Matt, Global Vice President Marketing Operations, Channels, and Analytics, **MetLife**
Kevin Chan, VP, North American Marketing, Analytics & Delivery, **TD (former)**
Elizabeth Walford, Founder & Managing Director, **Walford Partners** MODERATOR

TRACK 1: INDUSTRY EXPERT

TRACK 2: INDUSTRY EXPERT

10:00 AM THE POWER OF DUO

The Synergy of Paid and Organic Search

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

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

Develop methodologies for integrated search

Wayne Cichanski, Vice President, SEO & Site Experience, **iQuanti**

10:00 AM PRESENTATION: DIGITAL MARKETING INNOVATIONS

Next-Gen Strategies for Lead Generation in the Financial Industry

Digital marketing innovations are worth exploring and there are some tactics to generate qualified leads and increase customer engagement while maintaining transparency in communication. Create an actionable plan to:

- Build effective engagement tactics for generating qualified leads and their proven track record of Conversion Rate Optimization (CRO) successes.
- Make use of digital tools, calculators, and platforms, enriching user engagement by empowering individuals to assess their financial situation and explore solutions.
- Maintain ethical standards, ensuring empathetic and transparent communication across their Advisory B2C service lines.

Morgan Melnyk, Director, Marketing Performance, Data & Insights, **MNP**
Viktoriia Isler, Group Account Director, **DAC**

AGENDA - DAY 1

Tuesday, June 11th, 2024

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**.

11:00 AM 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.

11:30 AM C-SUITE EXCLUSIVE: 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.

Davinder Singh, CMO, **Borrowell**

Lois Tullo, Chief Revenue Officer, **Kuber Mortgage Investment Corporation**

Martin Aubut, CMO, **Nesto**

Andrew Lo, President & CEO, **Embark**

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

12:00 PM FIRESIDE: CONTENT MARKETING IN THE AGE OF AI

Evolving your Approach to Content: Challenges & 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. Take an effective approach to understanding the types of questions they asked, and how you can adapt them for your business. Walk away with an action plan to:

- Test tools for enhancing content creation, staying human while improving efficiency
- Plan for a dynamic new content world: from scaling content to the future of Google Search & AI Overviews, how can FIs adapt quickly?
- Recognize AI's potential as a way to supercharge your team, while coaching and building new skillsets

Improve your ability to research and test new technologies to evolve your marketing strategies.

Christy (Scott) Varicat, Director Marketing, CX and Digital Transformation, **Tangerine**
Jordan Levitin, Founder & CEO, **Levitin Insights /Strategy** MODERATOR

12:30 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**.

1:30 PM EXHIBITOR LOUNGE: VISIT BOOTHS & WIN PRIZES

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1:45 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**

AGENDA - DAY 1

Tuesday, June 11th, 2024

TRACK 1: BANKS & CREDIT UNIONS

2:15 PM PANEL: CUSTOMER RETENTION

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

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.

Martin Cyrenne, Vice President North American Digital Marketing, **Mitsubishi HC Capital Canada**
Nikhil Mahendra, Vice President and Head of Digital, **RBC Global Asset Management**
Elizabeth Walford, Founder & Managing Director, **Walford Partners** MODERATOR

TRACK 2: INSURANCE

2:15 PM FIRESIDE: MAKING THE COMPLICATED UNCOMPLICATED

Redefining a niche play in the financial space

Just like many other tools and investment options out there, work had to be done to update and uplift the niche corner of the market to appeal to modern Canadian households and create understanding within them.

Take away actionable strategies on how to transform your approach to modernize and simplify its offering to better appeal to families everywhere by:

- Bringing a traditionally analog product into the digital world;
- The value of research and how to apply it to your business and marketing approach;
- Marketing a complicated and highly regulated financial product to new and young families using modern channels and sensibilities; and Improve the customer experience and journey, online.

Improve the customer experience and journey, online.

Krista Vriend, VP Marketing & Communications, **Embark Student Corp**
Jordan Levitin, Founder & CEO, **Levitin Insights /Strategy** MODERATOR

2:50 PM INDUSTRY EXPERT: IMPACT OF DIGITAL PERSONALIZATION

Create Your Personalization Roadmap for Long-Lasting Customer Relationships

It is well established that digital personalization strategies have a direct impact on business growth, but to create 1:1 relationship at scale, brands need to create a single customer view at the customer, campaign and retail level. Create a blueprint to:

- Prioritize personalization strategies.
- Define key metrics required for building a single customer view.
- Make your tech stack work for you.

Embed 360 Customer View in your marketing framework.

Larry Filler, SVP & Practice Leader, **Environics Analytics**

3:20 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

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

3:45 PM FIRESIDE: MARKETING WEALTH MANAGEMENT TO HIGH NET WORTH INDIVIDUAL

How to Establish a Connection with an Affluent Demographic Through Content

SEO and user experience has significant added value that delivers increased market penetration, increases SEO metrics, referrals and ensures customer centric marketing. Attract high network clients through referrals, your existing client base. Master an action plan to:

- Build your client base who advocate your brand and benefit from your services.
- Creating an incentivized content program that help you earn referrals from other financial or legal professionals.
- Create a content that engages you in philanthropic initiatives or supporting causes that aligns with your potential client's interests.

Make your client's goals reality by aligning your vision with them through best content strategy.

Matthew Williams, VP, **Goldman Sachs**
Elizabeth Walford, Founder & Managing Director, **Walford Partners** MODERATOR

AGENDA - DAY 1

Tuesday, June 11th, 2024

4:15 PM CLOSING KEYNOTE: 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.

Idriss Bouhmouch, Digital Partnerships Lead, **National Bank of Canada**
Dina Beaucage, VP, Marketing, **Cambrian Credit Union** MODERATOR

4:45 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!

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

5:00 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!

5:30 PM CONFERENCE ADJOURNS TO DAY TWO



14th Annual

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

AGENDA - DAY 2

Wednesday, June 12th, 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 FIRESIDE CHAT: PROTECTION FROM FRAUD/RISKS

Leveraging Generative AI To Combat New and Existing Fraud Patterns

Amisha Parikh, VP, Product Strategy, Cyber & Intelligence Solutions, **Mastercard**
Elizabeth Walford, Founder & Managing Director, **Walford Partners** MODERATOR

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.

Corby Fine, VP, Digital Marketing & Performance, **IGM Financial**
Scott Feldman, Customer Intelligence, 360 Lead, **SAS**
Elizabeth Walford, Founder & Managing Director, **Walford Partners** MODERATOR

TRACK 1: INDUSTRY EXPERT

10:00 AM NAVIGATING THE SEO LANDSCAPE

Future-proofing Financial Services & Insurance for Generation AI

Gartner predicts a big shift. By 2026, they expect traditional search engine traffic to drop by 25%. Learn how financial services organizations are adapting SEO strategies to win in organic search today while preparing for the future of Generation AI (GenAI). Learn industry insights and trends about:

- State of SEO and GenAI within Financial Services
- What is intent personalization? We will explore ways to design modern experiences for unauthenticated and authenticated experiences.
- Why will reputation management strategies be the new trust signal for consumers, search algorithms and LLM

Shane Closser, Head of Industry/GM, Financial Services, **Ysxt**

TRACK 2: INDUSTRY EXPERT

10:00 AM DELIVERING A MEMORABLE DIGITAL EXPERIENCE

How To Accelerate Joint Engagement for FS Organizations

The evolution of Open Banking and opening up data and services to third parties is strongly linked to growth and innovation. As this new era in collaboration hits Canada and the US, FS organizations have no choice but to take digital transformation seriously and prioritize efforts without delay. Lead in digital-first engagements by going beyond the normal and setting up rewarding and innovation partnerships through:

- New customer demands for financial services: How collaboration can support faster growth
- Strengthening your technical foundation: who owns what in a digital partnership.
- The role of personalization in meeting customer needs: How can digital loyalty enable working together.
- Identifying the emerging customer demands for FinServ – partnering with a Fintech

Fast track your products and services via a collaborative digital team strategy

10:30 AM 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

11:00 AM ROUNDTABLES > DISCOVER THOUGHT-PROVOKING IDEAS

Take a deep dive down the innovation rabbit hole in one of our roundtable discussions. Share common challenges and best practices with your customer experience peers on a topic of your choosing:

AGENDA - DAY 2

Wednesday, June 12th, 2024

1. **AI Powered Creativity:** Delve into the power of AI at each interaction.
2. **Interactive Content Creation:** Leverage SEO on a digital platform.
3. **Communication:** Enhance customer and seller experiences through better communication.
4. **Audit & Compliance:** Leverage customer intelligence you can bank on adhering to all compliance matters.
5. **Conversion Rate Optimization:** CRO through SEM, Digital and Paid Media etc.

TRACK 1: MARKETING EXCELLENCE

11:30 AM FIRESIDE: CUSTOMER ATTENTION ON SOCIAL MEDIA PLATFORM

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

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

Avinash D'Souza, VP Product Marketing, **Global X Canada**
Erin Wilson, VP, Marketing, **Home Equity Bank**
Elizabeth Walford, Managing Director, **Walford Partners** MODERATOR

TRACK 2: DATA & INSIGHTS

11:30 AM FIRESIDE: MARKETING PLANS WITH COOKIE DEPRECATION

Rebecca Burgum, AVP, Marketing & Growth, **Sunlife**
Jordan Levitin, Founder & CEO, **Levitin Insights /Strategy** MODERATOR

TRACK 1: BANKS & CREDIT UNION

12:05 PM FIRESIDE: TRANSACTIONAL BANKING AND CLIENTS NEED

How to Manage Performance Transaction Banking

Banks need to consider looking beyond RoE targets at more relevant measures of performance and success. Master success factors to:

- Work towards understanding client needs
- Develop to continually meet client and entities un-met needs vs becoming a dev shop.
- Help clients manage their cash inflows and outflows in effective way.

Enable businesses to make informed decisions about spending and investments, which can help improve their financial performance.

Nilay Lad, Chief Product & Revenue Officer, **RBC**
Elizabeth Walford, Managing Director, **Walford Partners** MODERATOR

TRACK 2: WEALTH MANAGEMENT/ PRIVATE BANKING

12:05 PM FIRESIDE: AGILE MARKETING

How To Apply Agile Methodology Without Going 'Full Agile

Agile marketing principles can be applied without completely changing a team's way of working or abandoning compliance/ regulatory norms. See how you can create an action plan to:

- Use your client journey to prioritize work.
- Consider key agency partners to help you 'leapfrog' as part of your 'test and learn' strategy.
- Gain benefits of agile ways of working and avoid common downsides

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

Leanne Nullmeyer, Director Marketing & Brand Experience, **IGM Wealth Management**
Jordan Levitin, Founder & CEO, **Levitin Insights /Strategy** MODERATOR

12:35 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest industry issues**.
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- Enjoy great food and service while engaging with your **digital marketing colleagues**.

1:30 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**.
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AGENDA - DAY 2

Wednesday, June 12th, 2024

1:45 PM FIRESIDE CASE STUDY: CYBERSECURITY, COMPLIANCE & TRUST

How to Build on the Cybersecurity & Prepare for the Worst, Surviving the Attack, Coming out Stronger

Cybersecurity is vital in digital marketing, safeguarding 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 while being prepared for the worst.
- Avoid the gruelling process of rebuilding trust but take the necessary steps in the event the attack happens.

Transform your cybersecurity framework to significantly increase brand reputation.

Su Young Chun, Chief Strategy & Compliance Officer, **Payfare Inc.**

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

TRACK 1:

MARKETING EXCELLENCE

2:15 PM FIRESIDE: MARTECH DECISION-MAKING

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

Taylor Vowell, Vice President, Member Growth, **TDECU**

TRACK 2:

DATA & INSIGHTS

2:15 PM FIRESIDE: MARKET SHARE

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. Create solutions on:

- How AI can bolster your targeting efforts and boost lead generation. Source your plan of action with:
- Perfecting your boundary creation to ensure that your potential market share can readily access your messaging.
- Mitigating 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.

Victoria Nguyen, VP, **CIBC**

Christopher Young, Senior Director, Global Industry Strategy, **Adobe**
Elizabeth Walford, Managing Director, **Walford Partners** MODERATOR

Jordan Levitin, Founder & CEO, **Levitin Insights /Strategy** MODERATOR

2:45 PM EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

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

3:15 PM FIRESIDE: DELIVER A MEMORABLE EXPERIENCE

How to Accelerate your Digital Experience with Impact

The evolution of Open Banking and opening up data and services to third parties is coming, but how it will play out is still relatively unclear. As this new era in collaboration hits Canada and the US, FS Organizations have no choice but to take digital transformation seriously and prioritize efforts without delay. This session will help you answer questions like:

- How ready are we for open banking in Canada?
- Why is creating a memorable experience so hard, and how do we simplify?
- How do we pick the right partners?
- How personalized is too personal?
- Is there such thing as brand loyalty in an open banking world?

Dina Beaucage, VP, Marketing, **Cambrian Credit Union**

Jordan Levitin, Founder & CEO, **Levitin Insights /Strategy** MODERATOR

3:45 PM CLOSING FIRESIDE KEYNOTE: MARKETING EXCELLENCE

Reach Customers through Partnerships to Increase Brand Exposure

Marketing on digital platforms has become the key to success in financial services. It's no longer enough to just have a website or an app. Exceed your customers' evolving expectations by strengthening your partnerships. Leave with crucial insights to:

- Revamp your marketing strategy by partnering with other brands and influencers.
- Build a better brand experience.
- Focus on the business impact.

Idriss Bouhmouch, Digital Partnerships Lead, **National Bank of Canada**

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

4:15 PM CLOSING COMMENTS FROM YOUR HOST

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

4:30 PM CONFERENCE CONCLUDES

“

“Encouraging to see innovative and creative ways to solve the issues, constraints and challenges in a highly regulated industry. It’s nice to get out of your comfortable home environment to meet peers face to face, who have new and inspiring ideas.”

Bank of America



“

“The wealth of experience at the conference is amazing. If you are in the Digital Marketing field for Financial Services, this is one of the must-see, must-attend conferences.”

Macquarie Banking and Financial Services

“

“One of the best parts about events like this is actually getting to hear case studies, instead of the op-ed pieces you can read about in a blog. Really seeing the strategy go through with the analytics and results has been very helpful for us.”

Lincoln Financial Group

“

“It was a great experience. It was really interesting to hear different perspectives on what is a bit of a niche industry and niche practice. I’ve been to other marketing conferences that are a bit more broad, so I felt like at this particular conference I was able to write down a lot of key takeaways that I can implement in what I do every day.”

State Street Global Advisors



“

“The content and speakers exceed my expectations!”

Oxford Financial Group

“

“Excellent quality of presenters. Good variety of topics around digital issues, even beyond marketing.”

Standard Life

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

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Hyatt Regency Hotel Toronto
Toronto, Ontario

Take advantage of two days
of exclusive insights, in-depth
strategies, the latest digital
marketing technology and first
class networking.

BOOST CUSTOMER ENGAGEMENT

Get up to speed with the latest on building growth and customer engagement from Vanguard Canada, Mitsubishi HC Capital Canada, and RBC Asset Management. Learn about digital personalisation, building brand equity, and more.

LEVERAGE EFFECTIVE MARKETING STRATEGIES

Discover the most effective marketing strategies for lead generation, AI, digital personalisation, mobile applications, SEO, and more.

NAVIGATE AI AND EMERGING TRENDS

Step into the forefront of digital transformation and AI within marketing, through expert insights from Mastercard, Tangerine and others, on AI's incorporation with data, boosting productivity and generative AI for fraud.

HARNESS THE MOST ENGAGING MARKETING CHANNELS

Delve into discussions about the most effective marketing channels for engagement in your specific financial sector with insights from iQuanti, IGM Wealth Management, and others.

FACE-TO-FACE NETWORKING

Connect and build valuable relationships with our audience of thought leaders

