



# Digital Marketing *for* Financial Services

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Portfolio of Events 2025

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## GROW YOUR FINANCIAL SERVICES MARKET SHARE

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# JOIN FORCES WITH NORTH AMERICA'S FINANCIAL MARKETING EVENT LEADER

## 2025 EVENTS

1

10th Annual  
**Digital Marketing** *for*  
**Financial Services**  
Summit **WEST**

MAY  
21-22, 2025  
SAN FRANCISCO

2

15th Annual  
**Digital Marketing** *for*  
**Financial Services**  
Summit **CANADA**

JUNE  
11-12, 2025  
TORONTO

3

7th Annual  
**Digital Marketing** *for*  
**Financial Services**  
Summit **MIDWEST**

OCTOBER  
8-9, 2025  
CHICAGO

4

12th Annual  
**Digital Marketing** *for*  
**Financial Services**  
Summit **NEW YORK**

NOVEMBER  
5-6, 2025  
NEW YORK

- The **largest** and **longest-serving portfolio** of digital marketing for financial services events in North America for more than **15 years**
- **4 annual conferences** that solidify our reputation as a leader in the financial marketing space
- **15,000+ 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

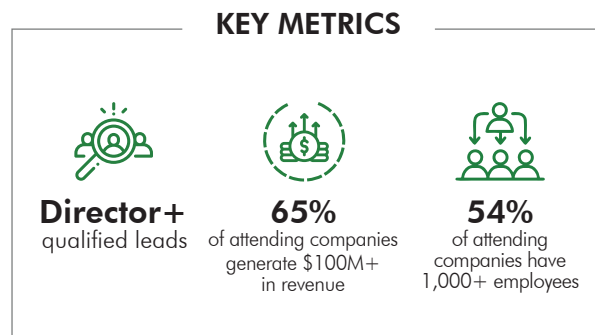
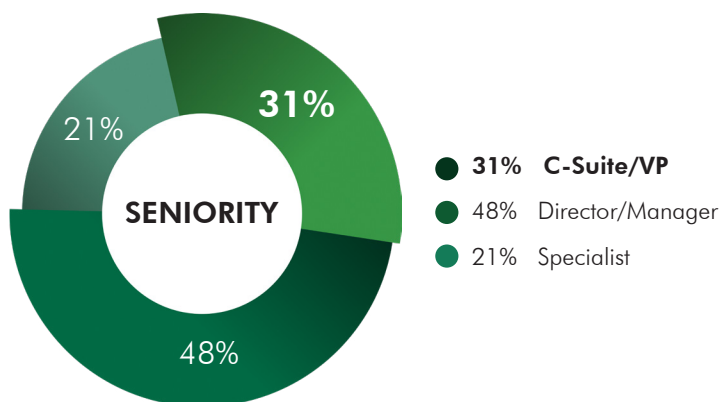
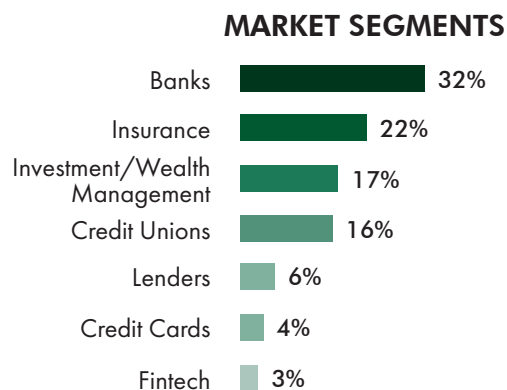
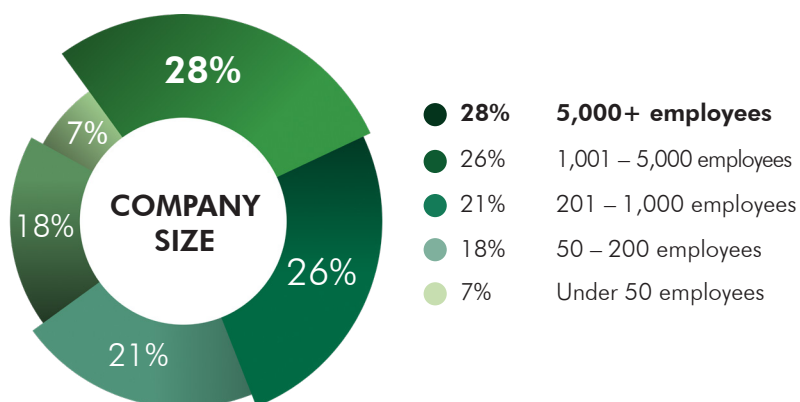
10th Annual

# Digital Marketing *for* Financial Services Summit WEST

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.

MAY  
21–22, 2025  
SAN FRANCISCO







## PAST SPEAKERS



**Maha Madain**  
CMO  
**Santander Bank**



**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 Chase**



**Shabina Anwar**  
VP, Global Loyalty Products  
**Mastercard**



**Ben Stuart**  
CMO & Head of US Marketing  
Strategy & Integration  
**BMO Financial**



**Carl Horne**  
VP, Digital Loan Products & Services  
**Farm Credit Services  
of America**



**Erin McReynolds**  
VP, Marketing & Client Experience  
**Fremont Bank**

## PAST ATTENDEES

STATE STREET GLOBAL ADVISORS

**usbank**

TRUIST

**AXOS**  
FINANCIAL

**CORVUS**

**SF FIRE**  
CREDIT UNION

Edward Jones

**HTLF**  
BANK

PIMCO

**PennMutual**

**Capital One**

Ameritas

**Patelco**  
CREDIT UNION

**ATB Financial**

**Sunwest Bank**

**PCBB**

**PARNASSUS**  
INVESTMENTS

**CALIFORNIA**  
COAST CREDIT UNION

## PAST SPONSORS

**VERDALE**

**Seismic**

**SITECORE**

**iQUANTI**

**XCENTIUM**

**Faraday Future**

**MERKLE**

**Delve**

**Adobe**

**brainjocks**

**X**

**Hootsuite**

**PANTHEON**

**PHASE 5**

**sprinklr**

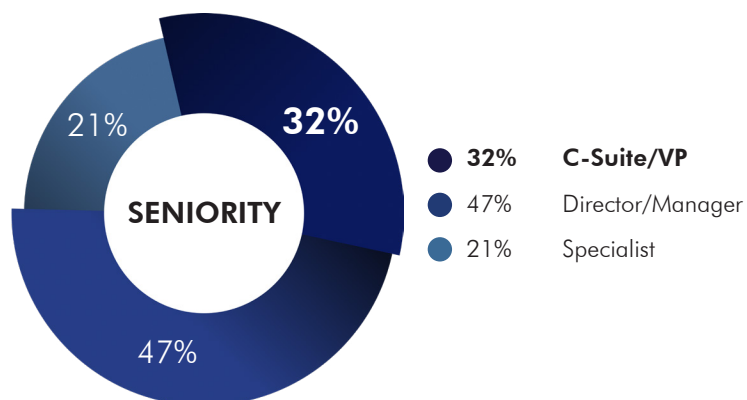
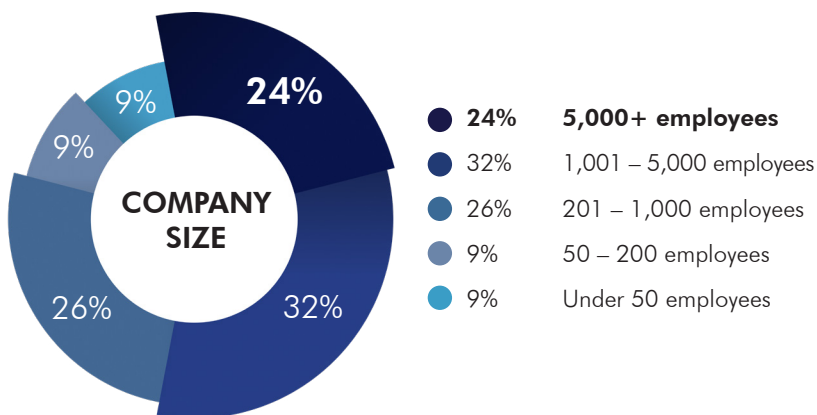
15th Annual

# Digital Marketing for Financial Services Summit CANADA

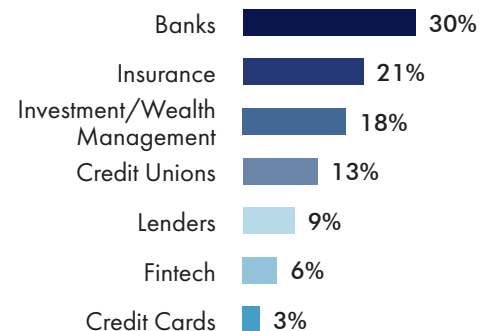
JUNE  
11–12, 2025  
TORONTO

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 \$100M+  
in revenue



**56%**  
of attending  
companies have  
1,000+ employees



## PAST SPEAKERS



**Betsey Chung**  
SVP & Global Chief  
Marketing Officer  
**TD Bank**



**Alan Depencier**  
CMO, Personal, Commercial  
Banking & Insurance  
**RBC**



**Renu Sihra Sehmi**  
Head of Enterprise Digital  
Marketing Operations  
**Scotiabank**



**Rajesh Panthri**  
VP, Advanced Analytics  
**Fidelity Investments**



**Siddharth Vishwanathan**  
Head of Digital Acquisition  
**BMO Financial Group**



**Rebecca Burgum**  
AVP & Head of Growth &  
Performance  
**Sun Life Financial Canada**



**Victoria Nguyen**  
VP, Project Delivery  
**CIBC**



**Avinash D'Souza**  
VP, Product Marketing  
**Global X Investments  
Canada**

## PAST ATTENDEES



Farm Credit Canada



## PAST SPONSORS





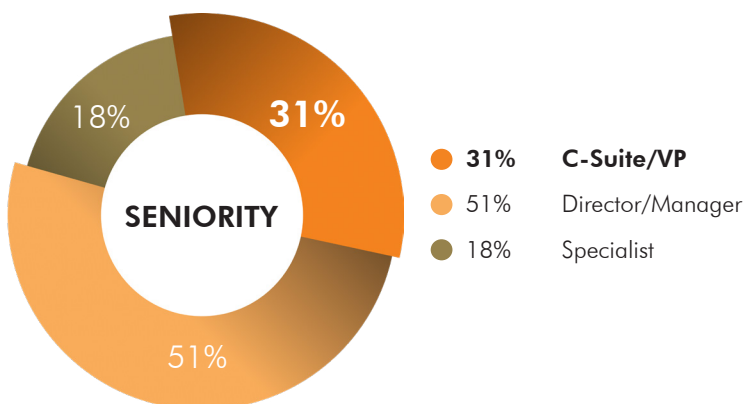
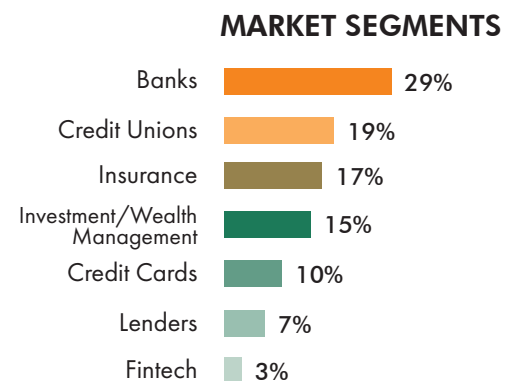
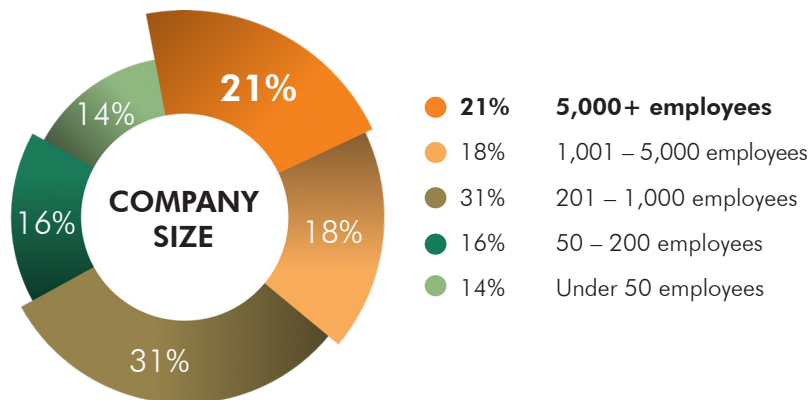
7th Annual

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

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.

OCTOBER  
8–9, 2025  
CHICAGO



## KEY METRICS



**Director+**  
qualified leads



**59%**  
of attending  
companies generate  
\$100M+ in revenue





## PAST SPEAKERS



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



**Vijay Konduru**  
EVP & CMO  
**Huntington National Bank**



**Brent F. Korte**  
SVP & CMO  
**Ameritas**



**Judy Edelson**  
CMO  
**Apple Bank**



**Monu Kalsi**  
VP, Marketing  
**CNO Financial Group**



**Alejandra Denda**  
CMO  
**The Federal Savings Bank**



**Sumeet Grover**  
Chief Digital & Marketing Officer  
**Alliant Credit Union**



**Danielle Bateman Gironde**  
CMO  
**Midwest BankCentre**

## PAST ATTENDEES



## PAST SPONSORS



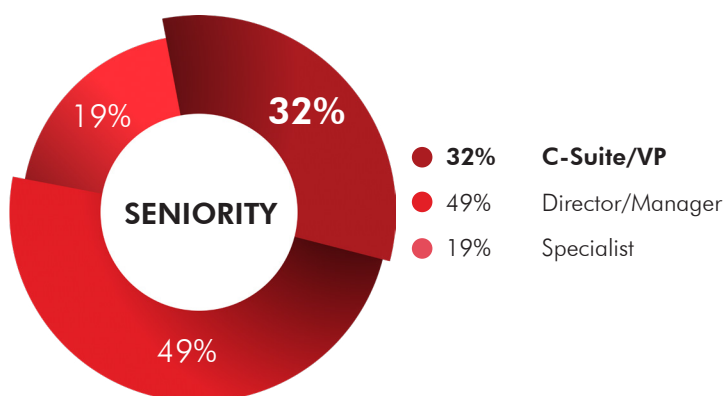
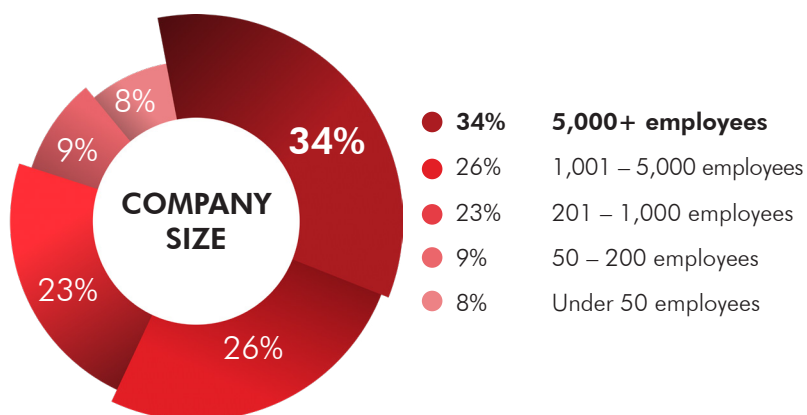
12th Annual

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

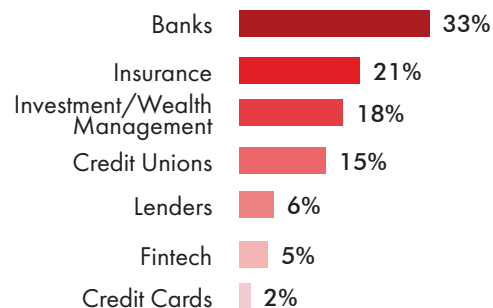
NOVEMBER  
5-6, 2025  
NEW YORK

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

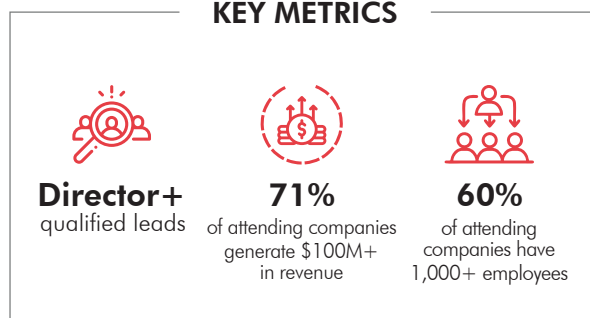
This innovative conference attracts **financial services executives** actively looking to invest in solutions to enhance their marketing and branding campaigns.



## MARKET SEGMENTS



## KEY METRICS







## PAST SPEAKERS



**Amy Hu**  
SVP & CMO  
**New York Life Insurance Company**



**Lynn Teo**  
Chief Marketing Officer  
**Northwestern Mutual**



**Jennifer Ball**  
Chief Marketing Officer  
**Franklin Templeton**



**Walter Agumbi**  
Managing Director, Global Head of  
Content & Product Marketing  
**Goldman Sachs Asset Management**



**Martiña Gago**  
SVP, Head of Content Strategy, Personal  
Banking & Wealth Management  
**Citi**



**Rich Smith**  
Chief Product & Marketing Officer  
**PenFed Credit Union**



**Henry Detering**  
Chief Marketing Officer  
**Neuberger Berman**



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

## PAST ATTENDEES

J.P.Morgan

Goldman Sachs

Morgan Stanley

BlackRock



T.RowePrice



Prudential

BANK OF AMERICA

TIAA

Edward Jones

WOODRUFF SAWYER



Penn Mutual

Blackstone

COLUMBIA THREADNEEDLE INVESTMENTS

BNY

MORNINGSTAR



STATE STREET

## PAST SPONSORS

Adobe

Seismic

SITECORE

eClerx

Epsilon

moengage

CheQ

DEMANDBASE

SAS

storyful

kaltura

Amplitude

Outlier

maru

GLASSBOX dynamic yield

Broadridge

Nielsen

# SPONSOR TESTIMONIALS

“

There is no other event that brings industry leaders in the same room with high intent. DMFS has done a great job of getting highly relevant companies and their highly engaged decision-makers through the door ... 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**

“

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.

**PHASE 5**

“

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®**

“

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**

“

Very good experience. The DMFS team put together an intimate event with many good-fit prospects; making it a valuable trip for our team to showcase our services.

**Capex**

“

Great event, worth the time and investment made by our team. Lots of strong influencers in the field to network with in a close setting.

**chartis**

“

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 exhibit booth.
- The package also includes:
  - ▶ A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - ▶ Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - ▶ Access to the complete delegate and speaker list
  - ▶ 3 all-access VIP 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 exhibit booth.
- The package also includes:
  - ▶ A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - ▶ Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - ▶ Access to the complete delegate and speaker list
  - ▶ 3 all-access VIP 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 exhibit booth
  - ▶ A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - ▶ Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - ▶ Access to the complete delegate and speaker list
  - ▶ 2 all-access VIP 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 all-access VIP passes for your team
  - ▶ Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials as well as promotion 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](mailto:darren@strategyinstitute.com)



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