



Digital Marketing *for* Financial Services

Portfolio of Events 2025

GROW YOUR FINANCIAL SERVICES MARKET SHARE

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
12-13, 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

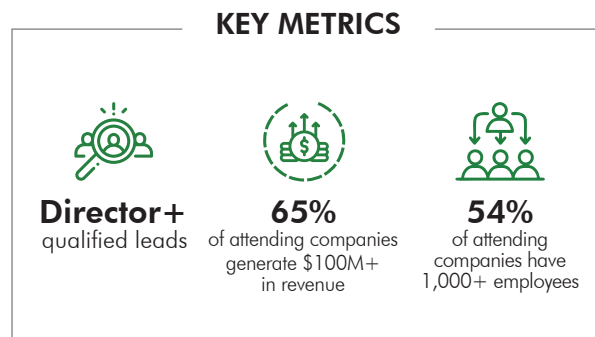
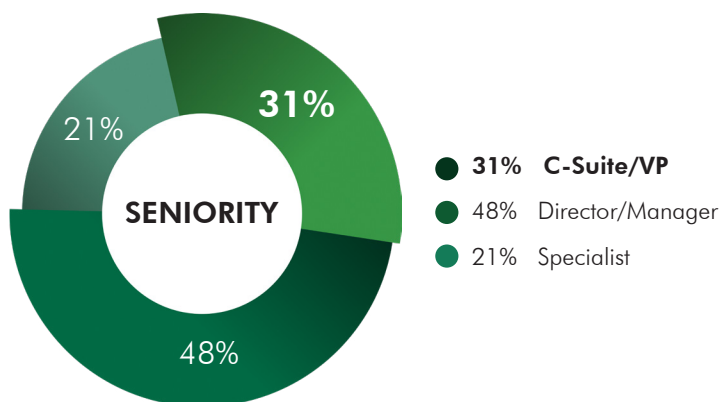
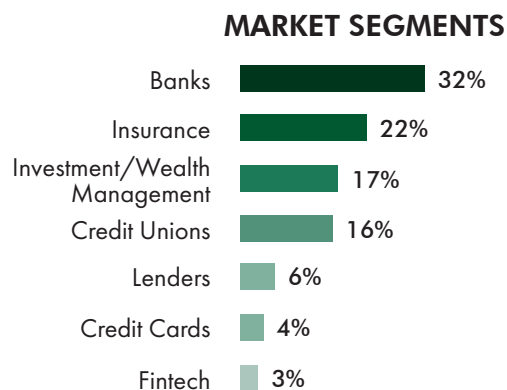
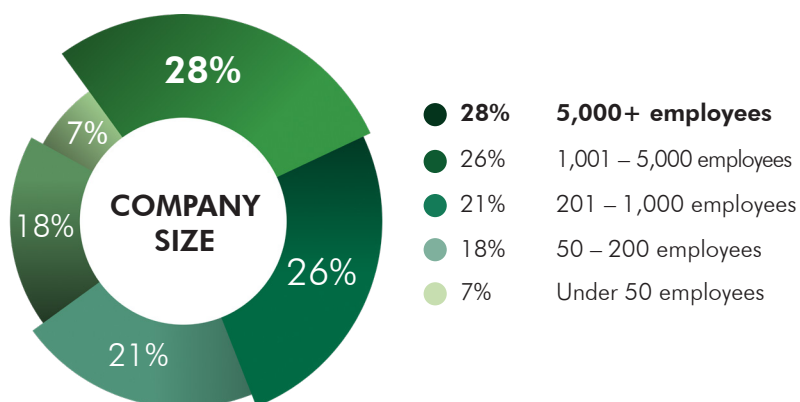
10th Annual

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

SITCORE

iQUANTI

XCENTIUM

Faraday Future

MERKLE

Delve

Adobe

brainjocks

X

Hootsuite

PANTHEON

PHASE 5

sprinklr

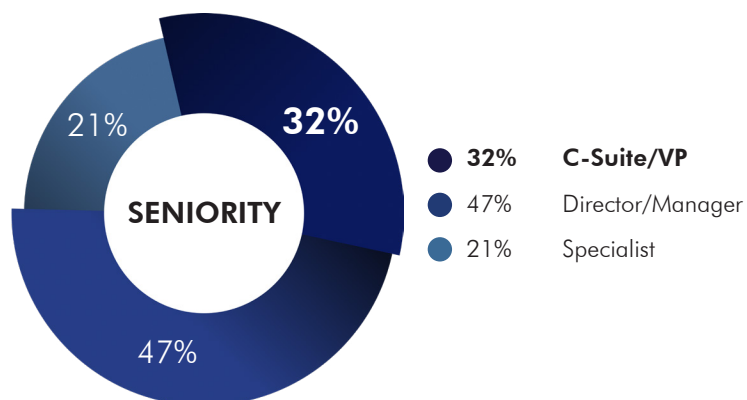
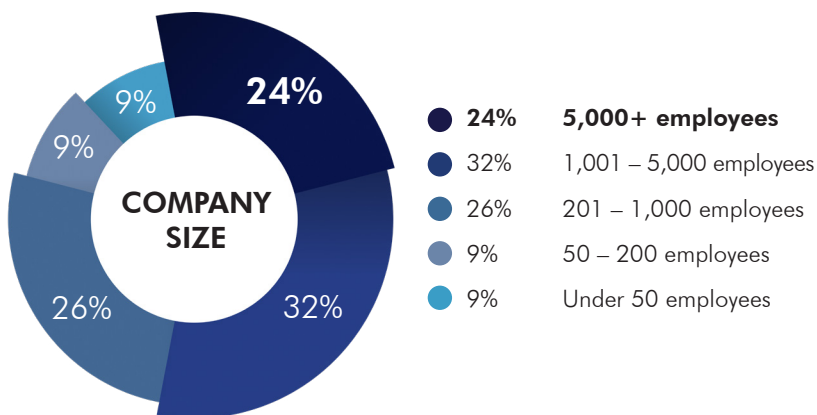
15th Annual

Digital Marketing for Financial Services Summit CANADA

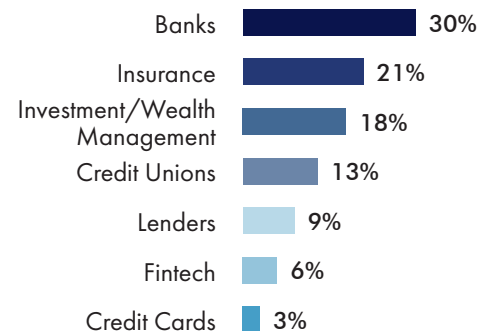
JUNE
12–13, 2025
TORONTO

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



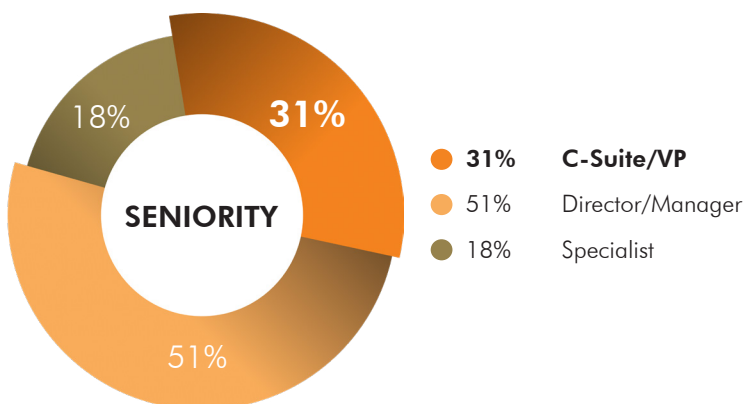
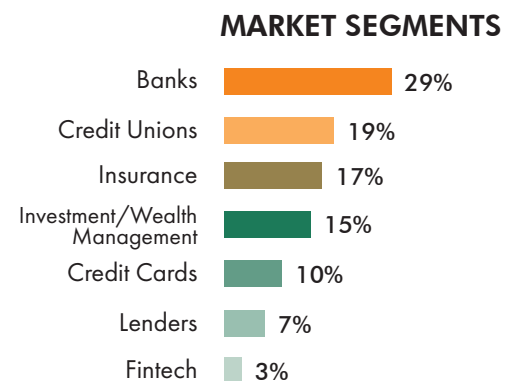
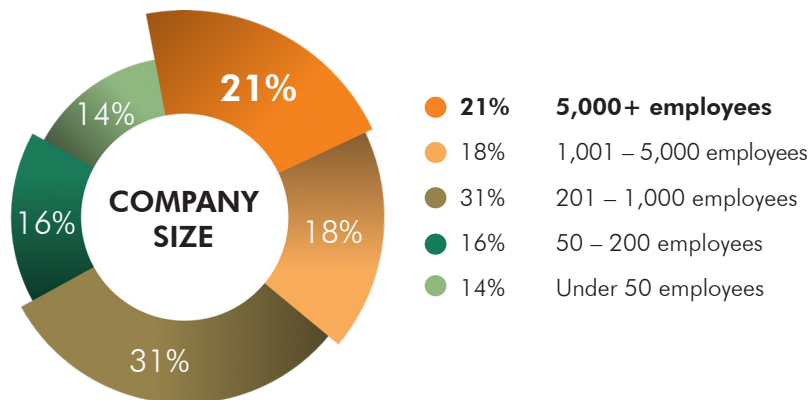
7th Annual

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



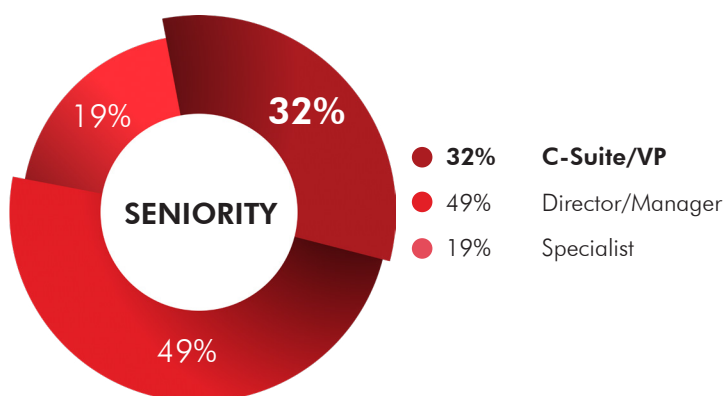
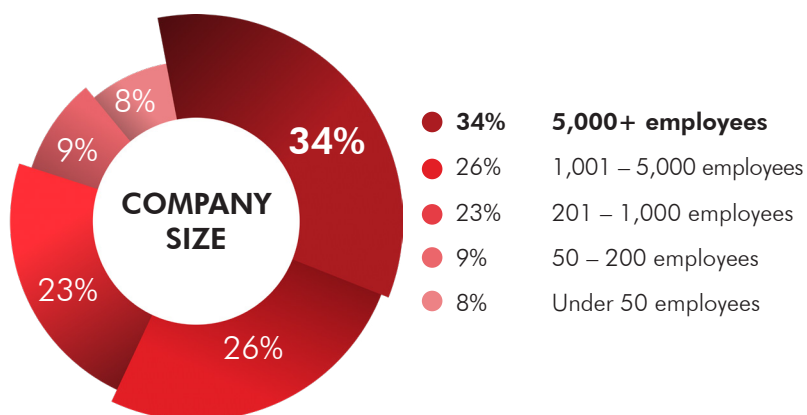
12th Annual

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

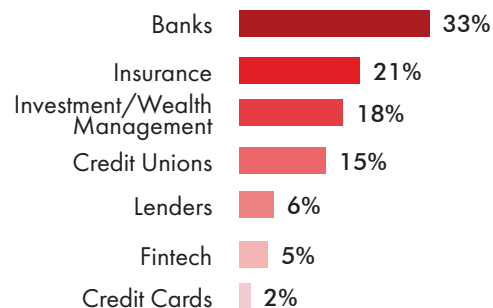
NOVEMBER
5-6, 2025
NEW YORK

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

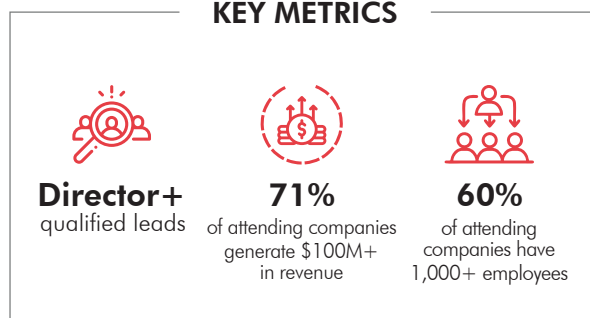
This innovative conference attracts **financial services executives** actively looking to invest in solutions to enhance their marketing and branding campaigns.



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



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