

15th Annual

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

June 12 & 13, 2025 | Sheraton Centre Toronto Hotel

The only event series  
designed for financial  
services leaders overseeing  
digital marketing strategy,  
operations, and technology.

## Harness data, AI, and creativity to drive measurable growth through your marketing strategy.

Expert speakers include:



**Selina Wang**  
Vice President, Marketing  
Programs, Payments  
**Chase**



**Akif Unal**  
Vice President, Growth  
Marketing  
**TD Bank**



**Kate Brown**  
Chief Marketing Officer  
**Insurely**



**Stella Ladizhinsky**  
Managing Director, Brand  
& Marketing Strategy  
**Questrade Financial  
Group**



**Erin Wilson**  
Vice President, Marketing  
**HomeEquity Bank**

# Welcome, Financial Services Marketing Leaders!

Dear Colleagues,

Welcome to the 15th Annual Canada edition of the DMFS Summit, which brings together the most innovative, engaged and influential financial services leaders driving customer growth.

The Summit is designed to support marketing, digital and experience leaders across a wide range of financial services with strategic guidance, practical tips, effective tools and innovative technology, delivered by the brightest minds in the industry. We have curated a two-day agenda, packed with case studies, workshops, panel discussions and roundtables, that will provide you with an actionable plan on how to unlock the full potential of your content strategy, drive growth through marketing and technology, strategically approach redefining your personalized engagement, incorporate AI-powered search for greater brand discovery, elevate your data-driven content strategy, enhance customer engagement through a social media listening strategy and much more.

Join us to source best practices from market-leading brands like Chase Bank, TD Bank, Canada Life, Insurely, Home Equity Bank, FS Investments, Park Place Financial and more.

Make lasting business connections that will help you excel in your transformation journey.

We look forward to welcoming you into the DMFS community and hosting you in June 2025!



Taya Prokopenko  
Head of Content, Digital Marketing for Financial Services  
Strategy Institute  
Taya@strategyinstitute.com

*"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**



## Why Attend?

- 1 Maximize ROI** through expertise-sharing on how to connect and engage audiences across multiple channels
- 2 Discover how to drive customer value and customer loyalty** with personalization at scale, creating lasting brand differentiation
- 3 Set up an effective organization**, delivering impactful marketing campaigns with lean teams and constrained budgets.
- 4 Incorporate technology-enabled** change management effectively to ensure your business remains dynamic and adaptable
- 5 Build relationships** the most engaged and influential thought leaders in the industry
- 6 Discover potential partners** that will help you take your business to the next level




# Agenda at a Glance

**The DMFS Canada Summit is the 15th edition of Canada's most exclusive and dedicated digital marketing and growth event series designed for the financial services industry. Join us to discuss best practices on:**

- 1 Empowering your business to make data-driven decisions** to unlock the full potential of your marketing investments
- 2 Driving marketing effectiveness, customer value, and loyalty** with AI-enabled personalized communication at scale
- 3 Enabling an agile marketing organization and structuring empowered teams** to respond to real-time business and consumer needs
- 4 Unlocking the value of marketing** to drive customer experience and growth through structural transformation
- 5 Amplify behavioural science and data to create content** that attracts and deeply resonates with your audience
- 6 Setting Strategic Priorities** to Stay Ahead of the Evolving Technological Landscape in a C-Level Only Circle
- 7 Maximizing Impact** Through Smarter Budget Allocation and Media Mix Optimization








## NEW WORKSHOPS

-  **AGILE MARKETING STRATEGY**  
Enabling Capacity Scaling Through an Agile Marketing Setup.
-  **GENERATIVE AI IN FINANCIAL SERVICES**  
Breaking the ROI Barrier with Generative AI in Financial Services
-  **INFLUENCER-FIRST CONTENT STRATEGY**  
Integrating Diverse Human-Centric Content Formats to Set Your Brand Apart in the Financial Sector



## NEW ROUNDTABLES INCLUDE

-  **INSURANCE MARKETING FOR THE DIGITAL AGE**  
Building Trust with Today's Consumers Through Multi-Channel Strategies and Digital Enablement.
-  **LEADERS' CIRCLE (C-LEVEL INVITATION-ONLY SESSION)**  
Setting Strategic Priorities to Stay Ahead of the Evolving Technological Landscape
-  **AFFILIATE AND PARTNER MARKETING**  
Relationships to Differentiate Your Brand and Grow Your Customer Base.
-  **BEST TIPS ON META AND LINKEDIN MARKETING.**  
Blending Field and Digital Tactics for Seamless Customer Journey
-  **DATA-DRIVEN STORYTELLING**  
Building a Beloved Brand in a Hated Industry.

 [More...](#)



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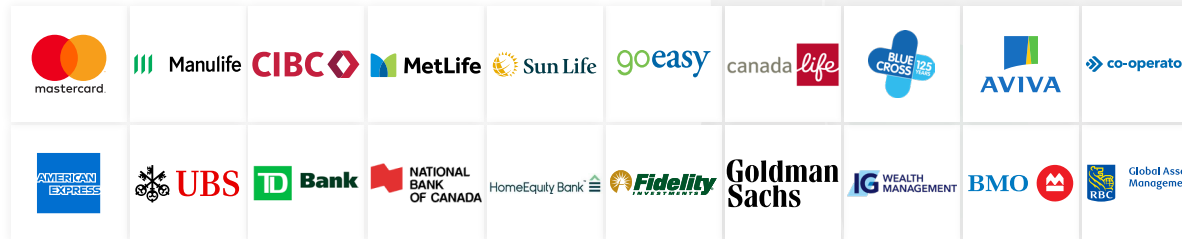
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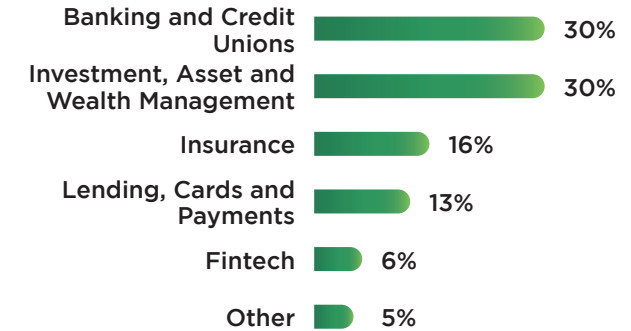
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# Who Attends

Network with senior peers from North America's top financial brands:



## Market Segment



### Marketing

C-Suite/SVP/VP/Director/  
Manager of:

Marketing Operations,  
Marketing Strategy, Digital  
Marketing, Customer/  
Client/Consumer  
Engagement, Social Media,  
Content, Brand, Media,  
Communications, Creative,  
Advertisement, Product  
Marketing, SEO, SEM,  
Growth



### Customer Experience

C-Suite/SVP/VP/Director/  
Manager of:

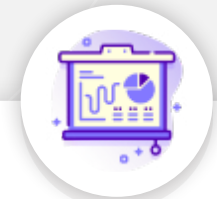
Customer/Client  
Experience, Customer  
Insight & Analytics,  
Customer Journey



### Digital

C-Suite/SVP/VP/Director/  
Manager of:

Digital Transformation,  
Digital Strategy, Digital  
Innovation, Digital  
Experience, Digital  
Distribution, Digital Product,  
Personalization.



### Data Analytics & Insights

C-Suite/SVP/VP/Director/  
Manager of:

Marketing Analytics,  
Customer Insight



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# Meet the Expert Speakers

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**Chris Hewitt**  
Global Head of Brand,  
Digital Marketing &  
Marketing Technology,  
Former Canada CMO  
**Sun Life**



**Katy Dugal Simpson**  
Chief Marketing Officer  
– The Callaway Black  
Group  
**Northwestern Mutual**



**Kate Brown**  
Chief Marketing Officer  
**Insurely**



**Selina Wang**  
Vice President,  
Marketing Programs,  
Payments  
**Chase**



**Akif Unal**  
Vice President, Growth  
Marketing  
**TD Bank**



**Margaret Adaniel**  
Vice President,  
Digital, Marketing &  
Communications  
**CIBC**



**Leanne Nullmeyer**  
Assistant Vice President,  
Marketing, Mass Affluent  
**IG Wealth Management**



**Stella Ladizhinsky**  
Managing Director,  
Brand & Marketing  
Strategy  
**Questrade Financial  
Group**



**Adiola Aviram**  
Assistant Vice President,  
Head of Marketing,  
Affinity Markets  
**Manulife**



**Susan LeBlanc**  
Vice President,  
Marketing  
**Meridian Credit Union**



**Erin Wilson**  
Vice President,  
Marketing  
**HomeEquity Bank**



**Laura Kennedy**  
Vice President,  
Marketing  
**Park Place Financial**



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# Meet the Expert Speakers

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**Madisyn McKee**  
Vice President,  
Marketing  
**Canaccord Genuity**



**Lara Coleman**  
Executive Director,  
Advertising & Content  
Marketing  
**FS Investments**



**Ghazal Taheri**  
Director, Brand &  
Acquisition  
**Meridian Credit Union**



**Steve Whiting**  
Director, Creative &  
Digital Marketing  
**HOOPP**



**Angelica Montagano**  
Head of Brand  
Experience  
**PWL Capital**



**Anooja Basole**  
Head of Marketing  
Platforms & Performance  
**First West Credit Union**



**Rachel Bourne**  
Head of Bank  
Partnerships  
**MaxMyInterest**



**Max Farley**  
Head of Marketing  
**Justwealth**



**Sarah Madden**  
Growth Marketing &  
Communications Lead  
**BOXX Insurance**



**Siddharth Vishwanathan**  
Digital Marketing  
Advisor  
**Canada Life**



**Jose Ariel de Trinidad**  
Chief Executive Officer  
**CPAMD**



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**REGISTRATION & NETWORKING BREAKFAST:** BUILD COMMUNITY CONTACTS

7:30 AM

**WELCOME FROM STRATEGY INSTITUTE**

8:40 AM

**OPENING REMARKS FROM THE CHAIRPERSON**

8:45 AM

**KEYNOTE PRESENTATION:** THE MODERN MARKETING PLAYBOOK

9:00 AM

### Bridging Data, Creativity, and Business Strategy to Drive Growth

Generate measurable business impact, align with financial decision-makers, and scale their efforts for maximum ROI by leveraging data, marketing technology, and creative strategy. This keynote will explore the core marketing skills and strategic levers needed to create high-value, insight-driven marketing functions. You will walk away with:

- A roadmap for connecting marketing strategy with business objectives to secure investment and leadership buy-in.
- Strategies to integrate data, creativity, and marketing technology for personalized engagement at scale.
- Insights on building a marketing career by aligning with key stakeholders, from the CMO to the CFO and CIO.

*Reimagine marketing as a strategic, revenue-driving force that shapes the future of your business.*

#### Chris Hewitt

Global Head of Brand, Digital Marketing & Marketing Technology, Former Canada CMO  
**Sun Life**



**KEYNOTE PANEL DISCUSSION:** ORGANIZATIONAL CHANGE MANAGEMENT

9:30 AM

### Transforming Marketing into a Growth Engine Through Agile Teams, Cultural Shifts, and Metrics That Matter

Lead an organizational transformation that positions marketing as a critical growth driver. This session will explore how to navigate leadership transitions, embrace collaborative methodologies, and build agile teams that deliver measurable impact. Master the success factors to:

- Shift from traditional to collaborative management to inspire innovation and align teams with business goals.
- Implement agile marketing practices and data-driven decision-making for impactful results.
- Redefine success through metrics and prioritize data-driven decision-making.

*Transform your marketing strategies to achieve meaningful organizational growth.*

#### Leanne Nullmeyer

Assistant Vice President, Marketing, Mass Affluent  
**IG Wealth Management**



#### Erin Wilson

Vice President, Marketing  
**HomeEquity Bank**



#### Adiela Aviram

Assistant Vice President,  
Head of Marketing, Affinity Markets  
**Manulife**



### INDUSTRY EXPERT PRESENTATION: MARKETING INSIGHT AND ANALYTICS

10:15 AM

#### Increase the Insight Maturity of Your Organization to Measure Success, Drive Growth, and Maximize Customer Experience

Leverage advanced analytics to identify the most effective marketing methods and optimize campaigns for maximum engagement, conversion, and sales. Develop a blueprint to:

- Consolidate fragmented data across your marketing technology stack.
- Bridge the data and analytics skills gap in your organization through advanced insight technologies.
- Use predictive models to forecast and measure the impact of your marketing and advertising campaigns.

*Improve how your advertising and marketing campaigns connect with and engage audiences across multiple channels to maximize ROI.*

### SPEED NETWORKING

10:45 AM

**REFRESHMENTS BREAK & EXHIBITOR LOUNGE:** ATTEND  
VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

11:00 AM

11:30 AM

### TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

#### INDUSTRY EXPERT PRESENTATION: AI-ENABLED PERSONALIZATION

##### Driving Marketing Effectiveness, Customer Value, and Loyalty with Personalized Communication at Scale

Deliver a boost in revenue by shifting towards AI-driven personalization and leveraging predictive insights to understand and tailor strategies to your customers' needs. Walk away with an action plan on:

- Discovering new ways to use your existing data to reach your customers in the right place at the right time.
- Working towards a centralized, unified view of data.
- Leveraging the context of each customer interaction to enhance the customer experience.

*Optimize customer experiences to create lasting brand differentiation.*

### TRACK B: CONTENT, BRAND, & MEDIA

#### INDUSTRY EXPERT PRESENTATION: CONTENT STRATEGY 2.0

##### Unlocking the Full Potential of Your Content Strategy

Elevate your brand's visibility and effectively engage with your audience in a rapidly evolving digital landscape. Take back to your office strategies to:

- Uncover hidden opportunities within your existing content strategy.
- Leverage new channels and techniques to amplify your reach.
- Adapt to evolving content consumption trends across platforms and devices.

*Amplify audience engagement by refining your content strategy to exceed expectations and drive meaningful connections.*





12:00 PM

### TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

**CASE STUDY:** GROWTH-DRIVEN OPERATING MODEL FOR YOUR MARKETING DEPARTMENT

#### Structuring Teams, Technology, and Strategy to Scale Without Limits

Discover how a purpose-driven credit union restructured its marketing team to shift from an internal service provider to a strategic growth driver. This session will explore how aligning people, processes, and technology enables scalable growth without exponentially increasing budgets and resources. You will walk away with insights on:

- Implementing a new marketing operating model to support business growth at scale.
- Leveraging AI and process automation to drive efficiency and maximize impact.
- Aligning brand strategy with growth objectives to attract new audiences and embed brand values across the organization.

*Empower your marketing team to lead business transformation and drive sustainable growth.*

**Susan LeBlanc**  
Vice President, Marketing  
**Meridian Credit Union**



### TRACK B: CONTENT, BRAND, & MEDIA

**CASE STUDY:** PODCASTS AS AN EFFECTIVE MARKETING TOOL

#### Launching a Podcast in a World Where Everyone Has a Podcast

Grow your brand awareness, educate your customer base, and reach a new audience by launching your own podcast. You will walk away with firsthand practical tips from the FS Investments podcast journey. Achieve a step-by-step action plan to:

- Overcome the most common technical and business challenges.
- Navigate any budget.
- Define success measures.

*Increase brand visibility in a saturated financial market by facilitating valuable conversations to empower sales and business development teams.*

**Lara Coleman**  
Executive Director, Advertising & Content Marketing  
**FS Investments**



12:30 PM

### TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

**PANEL DISCUSSION:** DATA-DRIVEN DEMAND GENERATION IN FINANCIAL SERVICES

#### Optimizing Engagement, Lead Nurturing, and Pipeline Growth

This panel will explore how financial institutions are modernizing their approach to customer acquisition, using data-driven insights to optimize engagement and improve marketing ROI. You will walk away with actionable insights on:

- Building a scalable demand generation strategy that aligns with customer behavior and industry trends.
- Leveraging data and technology to refine targeting, personalize engagement, and optimize lead nurturing.
- Balancing automation with high-touch interactions to enhance relationships and drive conversions.

*Discover how to elevate your demand generation strategy and create a data-enabled engagement model that delivers measurable results.*

#### Anooja Basole

Head of Marketing Platforms & Performance  
**First West Credit Union**



#### Sarah Madden

Growth Marketing & Communications Lead  
**BOXX Insurance**



#### Madisyn McKee

Vice President, Marketing  
**Canaccord Genuity**



### TRACK B: CONTENT, BRAND, & MEDIA

**PANEL DISCUSSION:** THE NEW AGE OF CREATIVE STORYTELLING

#### Driving Brand Connection with Authentic Content in a Crowded Media Landscape

Reimagine your creative strategies to build deeper connections with your audiences. This panel will explore the shifts in creative work, the evolution of video marketing, and leveraging storytelling to stand out in a crowded media landscape. Adopt best practices to:

- Bring creative work in-house to enhance brand alignment, efficiency, and innovation.
- Leverage human-centred storytelling and video marketing to connect with customers on a deeper level.
- Navigate organizational changes to empower marketing teams to focus on impactful, revenue-driving content.

*Transform your creative strategies to inspire, engage, and differentiate your brand in today's competitive environment.*

#### Margaret Adaniel

Vice President, Digital, Marketing & Communications  
**CIBC**



#### Stella Ladizhinsky

Managing Director, Brand & Marketing Strategy  
**Questrade Financial Group**



#### Angelica Montagano

Head of Brand Experience  
**PWL Capital**



#### Steve Whiting

Director, Creative & Digital Marketing  
**HOOPP**



**NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS**

1:15 PM



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2:15 PM

### TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

**INDUSTRY EXPERT PRESENTATION:** THE PIVOT YEAR IN MARTECH AND ADVANCED ANALYTICS

#### Building Foundations for Growth

Modernize your engagement layer and build new technology roadmaps with data and AI. Achieve a step-by-step action plan to:

- Leverage predictive, conversational, and generative AI to augment productivity and enhance experiences.
- Deploy 'WFT' tools that help advisors focus their efforts, scale their time, and enhance engagement.
- Differentiate experiences, services, and solutions to attract new client segments (UHNW, HNW, Affluent, Mass Affluent).

*Optimize your MarTech stack and data that flows along the revenue cycle to acquire new clients, expand AUM, and increase organic growth.*

### TRACK B: CONTENT, BRAND, & MEDIA

**INDUSTRY EXPERT PRESENTATION:** SOCIAL MEDIA LISTENING STRATEGY  
**Gain Competitive Advantage by Uncovering Invaluable Consumer Insights**

Integrate social listening into your customer-centric strategy to enhance customer engagement and retention. Master the success factors to:

- Translate conversations into actionable business insights that drive revenue.
- Align your content and messaging with customer needs and market trends.
- Uncover industry insights and customer sentiments.

*Advance your brand reputation and build a loyal customer base by proactively addressing customer concerns and needs.*



2:45 PM

### WORKSHOP 1: MARKETING LEADERSHIP AND CAREER PROGRESSION

OR

### WORKSHOP 2: ELEVATING ADVISOR POSITIONING IN WEALTH AND ASSET MANAGEMENT

OR

### WORKSHOP 3: INFLUENCER-FIRST CONTENT STRATEGY

#### Building the Skills and Visibility Needed for Executive Roles

Marketing professionals often find themselves at a crossroads once they've mastered core technical skills, realizing leadership requires a different set of competencies. This workshop will explore how to chart a clear growth path, develop the leadership skills essential for senior roles, and cultivate sponsorship that accelerates career progression. You will walk away with actionable strategies on:

- Identifying leadership gaps and proactively addressing them to transition from tactical to strategic influence.
- Seeking and securing sponsorship from senior leaders to open new opportunities and broaden your visibility.
- Building the purpose-led identity, confidence, and communication skills needed to thrive at the executive level.

*Empower yourself to break through career plateaus, elevate your leadership impact, and shape your journey in modern marketing.*

Led by:  
**Adiela Aviram**  
Assistant Vice President,  
Head of Marketing,  
Affinity Markets  
**Manulife**



#### Strengthening Market Presence, Client Engagement, and Thought Leadership

In a competitive wealth and asset management landscape, advisors must differentiate themselves by building strong client relationships, leveraging thought leadership, and effectively navigating market events. This workshop will provide strategic insights into crafting a compelling value proposition, positioning in local markets, and using content-driven storytelling to strengthen the advisor-client connection. You will walk away with actionable strategies on:

- Defining and communicating a value proposition that resonates with both clients and intermediary partners.
- Equipping advisors with content and thought leadership tools to guide client conversations and navigate market events in real time.
- Aligning internal storytelling and brand positioning to enhance credibility and market presence.

*Empower advisors with the tools, narratives, and positioning strategies they need to stand out in the evolving wealth and asset management space.*

Led by:  
**Margaret Adaniel**  
Vice President, Digital,  
Marketing & Communications  
**CIBC**



#### Integrating Diverse Human-Centric Content Formats to Set Your Brand Apart in the Financial Sector

Explore how innovative financial brands are breaking away from traditional marketing by integrating diverse, human-centric content formats. This workshop will showcase the strategic implementation of influencer-first approaches, creative storytelling through influencers, SMEs, and brand ambassadors, as well as leveraging platforms like podcasts, YouTube, and blogs. Take back to your office strategies to:

- Build authentic connections with audiences through relatable and engaging content.
- Create a cohesive content ecosystem that amplifies your brand's reach and impact.
- Align your content strategy with organizational goals to deliver measurable results.

*Transform your approach to content creation to position your brand as a leader in the financial sector.*

Led by:  
**Angelica Montagano**  
Head of Brand Experience  
**PWL Capital**





**REFRESHMENTS BREAK & EXHIBITOR LOUNGE:** ATTEND  
VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

3:30 PM

**EVALUATIONS**

3:55 PM

**INDUSTRY EXPERT PRESENTATION:** A MODERN APPROACH TO CUSTOMER JOURNEY ORCHESTRATION

4:00 PM

### Using AI to Improve Customer Experience and Customer Journey Orchestration

Elevate your approach by leveraging AI-driven customer journey orchestration to ensure every interaction is fresh and relevant to each customer. Source practical tips to:

- Activate customer journey data to deliver a personalized experience.
- Orchestrate omnichannel journeys.
- Optimize performance across channels and touchpoints.

*Amplify your real-time decisioning tools to deliver personalized conversations at scale.*

**CASE STUDY:** DATA-DRIVEN CONTENT STRATEGY

4:30 PM

### Blending Data, Brand, and Behavioural Insights to Drive Engagement and Loyalty

Discover how to craft a powerful, data-driven narrative that seamlessly integrates content and brand strategy, rooted in behavioural science. This case study will share practical insights. Adopt best practices to:

- Develop audience-centric marketing strategies that combine data insights with behavioural patterns.
- Build nuanced audience personas to shape narratives that connect emotionally and intellectually.
- Align content with your brand's identity and audience behaviours to optimize engagement across channels.

*Amplify behavioural science and data to create content that attracts and deeply resonates, driving meaningful connections and lasting loyalty.*

**Kate Brown**  
Chief Marketing Officer  
**Insurely**



**END OF DAY ONE SUMMARY & CLOSING REMARKS**

5:00 PM

**EVENING RECEPTION:** ENJOY GREAT CONVERSATION, MUSIC, & NETWORKING

5:05 PM



### DAY TWO REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

8:00 AM

### DAY TWO OPENING REMARKS FROM THE CHAIRPERSON

8:50 AM

### CASE STUDY: MARKETING TRANSFORMATION IN ACTION

9:00 AM

#### Leveraging Agility, Technology, and Data to Drive Growth

Explore how TD Bank is reshaping its marketing function to align with a growth-driven strategy. This session will highlight the bank's comprehensive transformation journey, focusing on adopting agile methodologies, embracing digital innovation, and integrating AI and GenAI to enhance decision-making and customer engagement. You will walk away with actionable insights on:

- Implementing agile processes to build a more adaptive and responsive marketing organization.
- Driving growth through technology and digital transformation.
- Becoming a data-driven marketing function with AI and GenAI at its core.

*Discover how to transform your marketing approach to fuel growth and innovation in today's competitive landscape.*

#### Akif Unal

Vice President, Growth Marketing

**TD Bank**



### INDUSTRY EXPERT PRESENTATION: AI-POWERED SEARCH

9:30 AM

#### Adapting for Greater Brand Discovery in an Evolving Landscape

Explore how AI is reshaping the way consumers discover brands online. This session will provide you with actionable guidance. Source your plan of action by:

- Adapting to algorithm changes to maintain a competitive edge and ensure continued brand visibility.
- Optimizing your search presence to increase organic traffic and improve ranking across key platforms.
- Leveraging AI-driven insights to tailor content and strategies that resonate with target audiences and drive engagement.

*Increase your brand's visibility and discovery to attract more qualified leads and strengthen your online presence.*



10:00 AM

### PANEL DISCUSSION: AI-DRIVEN TRANSFORMATION

#### Driving Your Organization Towards Rapid and Responsible Exploration of AI Capabilities for Process Optimization, Scaling, and Customer Journey Improvements

Discover how early adopters discern the most impactful business use cases, separating reality from hype and swiftly involving relevant internal stakeholders. Adopt best practices to:

- Navigate a use case from pilot setup to execution stage.
- Address privacy and bias concerns within internal teams and external customers.
- Identify opportunities to upskill your teams with AI-powered tools.

*Transform your AI capabilities to unlock new levels of efficiency, innovation, and competitive advantage in your marketing strategies.*

**Selina Wang**

Vice President, Marketing Programs, Payments

**Chase**

**CHASE**

10:45 AM

### REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS



11:15 AM

### ROUNDTABLE DISCUSSIONS

Break into smaller groups of approximately 10 industry peers to work through a series of questions and challenges to share knowledge on a particular topic that is most critical to your role and business.

**A: INSURANCE MARKETING FOR THE DIGITAL AGE:** Building Trust with Today's Consumers Through Multi-Channel Strategies and Digital Enablement.

Led by: **Siddharth Vishwanathan**, Digital Marketing Advisor, **Canada Life**



**B: AFFILIATE AND PARTNER MARKETING:** Leveraging Relationships to Differentiate Your Brand and Grow Your Customer Base.

Led by: **Erin Wilson**, Vice President, Marketing, **HomeEquity Bank**



**C: THE PERFECT MARKETING DUO:** Blending Field and Digital Tactics for Seamless Customer Journeys.

Led by: **Laura Kennedy**, Vice President, Marketing, **Park Place Financial**



**D: BRAND AS A GROWTH ENGINE:** (Re)launching And Activating Your Brand to Attract New Audiences and Deepen Relationships.

Led by: **Ghazal Taheri**, Director, Brand & Acquisition, **Meridian Credit Union**



**E: DATA-DRIVEN STORYTELLING:** Building a Beloved Brand in a Hated Industry.

Led by: **Kate Brown**, Chief Marketing Officer, **Insurely**



**F: DOING MORE WITH LESS:** Leveraging Existing Resources to Attract More Customers Today.

Led by: **Rachel Bourne**, Head of Bank Partnerships, **MaxMyInterest**



**G: HUMAN-CENTRIC BRAND IN ACTION:** Creating Strategies to Build Trust, Loyalty and Engagement.

Led by: **Jose Ariel de Trinidad**, Chief Executive Officer, **CPAMD**



### LEADERS' CIRCLE (C-LEVEL INVITATION-ONLY SESSION)

#### Setting Strategic Priorities to Stay Ahead of the Evolving Technological Landscape

Don't miss this exclusive session designed for C-level financial services leaders. It brings together 25 senior marketing and digital executives to drive organizational success and business impact in 2025. Take away specific solutions to:

- Understand the impact of key trends on fellow financial services CMOs and how that will shape their strategy going forward.
- Plan your next steps for delivering exceptional growth and customer experiences.
- Benchmark investment priorities and success metrics.

*Achieve a winning vision and actionable strategies to ensure your teams excel, guided by industry-leading experts.*

**This is an invitation-only, closed-door session. Please enquire for access to this session at [taya@strategyinstitute.com](mailto:taya@strategyinstitute.com).**





12:15 PM

### TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

#### PANEL DISCUSSION: MODERN MARKETING OPERATIONS

##### Optimizing Sales and Marketing Operations for Maximum Efficiency and Growth

Leverage AI to transform marketing and sales operations, improve distribution strategies, and enhance performance across the board. This panel will offer practical insights into how modern marketing operations are adapting to the digital age. Walk away with an action plan on:

- Implementing effective digital strategies that align with your sales and marketing goals.
- Building and structuring a high-performing digital team that can stay ahead in a fast-changing landscape.
- Overcoming key challenges in integrating AI into your marketing operations and distribution strategies.

*Advance your marketing operations and drive sustained growth to align technology, talent, and strategy for optimal results.*

**Siddharth Vishwanathan**  
Digital Marketing Advisor  
**Canada Life**



### TRACK B: CONTENT, BRAND, & MEDIA

#### CASE STUDY: MODERN FINANCIAL MARKETING FOR ADVISORS

##### Empowering Advisors to Build Stronger Client Connections in a Digital Era

Develop a successful advisor marketing program that leverages social media, personalization, and targeted outreach. Discover how innovative strategies have empowered advisors to enhance their presence, connect with diverse client segments, and build stronger relationships. Source effective tips on:

- Creating a strategic social media framework that helps advisors position themselves effectively in the digital space.
- Balancing compliance requirements with authentic, personalized marketing to engage both older clientele and the next generation.
- Developing strategies that enable advisors to build trust, improve visibility, and showcase their expertise.

*Transform advisor marketing strategies to align with evolving client expectations and market dynamics.*

**Katy Dugal Simpson**  
Chief Marketing Officer – The Callaway Black Group  
**Northwestern Mutual**



12:45 PM

### TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

#### INDUSTRY EXPERT PRESENTATION: ENABLING PERSONALIZATION

##### Enhancing the User Experience Through a Robust Personalization Strategy

Implement personalization capabilities, aiming to deliver unique experiences to your clients and prospects at scale. This session provides insights to help you develop a roadmap for personalization within your organization. Take back to your office strategies to:

- Assess the impact on your business setup and drive effective change management across multiple lines of business.
- Leverage existing data in a more compelling way to enhance personalization.
- Optimize the placement of tools and data in collaboration with IT to maximize their capabilities.

*Master a roadmap for increasing personalization maturity in your organization to enhance your digital experience.*

### TRACK B: CONTENT, BRAND, & MEDIA

#### INDUSTRY EXPERT PRESENTATION: VIDEO CONTENT IN FINANCE

##### Best Ways to Leverage Video in 2025 to Boost Customer Engagement

Integrate top video tips and practices into your content strategy to maximize engagement, conversation, and customer experience. Source practical tips to:

- Scale video capabilities through partnerships and video-generating technologies.
- Identify the most impactful metrics and indicators to assess success.
- Analyze data to identify patterns, compare channels, and maximize engagement.

*Increase data-driven video marketing to capture attention and educate your customers.*

### NETWORKING LUNCH

1:15 PM

### EXHIBITOR LOUNGE VISITS & PRIZE DRAW WINNER ANNOUNCEMENT

2:15 PM

#### INDUSTRY EXPERT PRESENTATION: VIDEO & GENAI

##### Scaling Personalization to Drive Customer Growth

Personalized, engaging digital experiences have become critical to understanding your customers and ultimately driving growth. But how can you meet your diverse customers' needs, on multiple channels and at scale, while ensuring compliance and fostering loyalty? Join us to gain actionable insights into creating connections and future-proofing your digital marketing efforts in financial services. Develop a blueprint to:

- Personalize digital experiences to connect with audiences and build long-lasting relationships.
- Create, repurpose, and personalize videos, webinars, virtual and hybrid events, and podcasts at scale with a built-in, AI-infused intelligent content lab.
- Engage audiences with interactive, real-time AI-assisted engagement tools – and leverage that precious 1st-party engagement data to optimize event and content strategies as well as boost ROI.

*Bolster long-lasting connections with future-proof digital marketing experiences that boost reach, engagement, 1st party data, and ROI.*

2:30 PM



3:00 PM

### PANEL DISCUSSION: DOING MORE WITH LESS

#### Building Brands and Maximizing Impact with Strategic Resource Allocation

Deliver impactful marketing campaigns with lean teams and constrained budgets. This session brings together marketing leaders to share proven strategies for building a successful marketing function, leveraging external partners, and launching effective campaigns that drive results. Create a roadmap to:

- Create strong marketing foundations, including brand guides, content strategies, and website optimization.
- Build team skills and leverage external partners to expand your capabilities.
- Design and execute high impact multimedia campaigns on limited budgets.

*Achieve impactful marketing results by optimizing resources and building a resilient, effective team.*

**Max Farley**  
Head of Marketing  
**Justwealth**



3:45 PM

### PRESENTATION: MAXIMIZING MARKETING IMPACT WITH LIMITED BUDGETS

#### Driving Results Through Smart Targeting, Personalization, and Analytics

Achieve stronger marketing results by maximizing efficiency with your budget. Drawing from real-world examples from Credit Unions to digital to traditional financial services, this session will explore strategies to optimize resources through data-driven targeting, personalization, and CRM strategies. You will walk away with actionable insights on:

- Allocating marketing budgets efficiently to deliver stronger results without increasing spend.
- Leveraging data, analytics, and CRM tools to refine targeting and enhance personalization across channels.
- Building a media mix strategy that maximizes customer engagement and drives measurable outcomes.

*Discover how to make your marketing dollars work harder with smarter strategies that deliver lasting impact.*

**Anooja Basole**  
Head of Marketing Platforms & Performance  
**First West Credit Union**



4:15 PM

### CLOSING REMARKS & END OF SUMMIT



# Sponsorship Opportunities

Support North America's largest and scaling financial brands on their marketing transformation journey with your **technology solutions, strategic expertise and implementation experience.**

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Depending on your needs, the sponsorship packages can include:

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- ✓ Closed-door curated sessions for a selected group of participants
- ✓ Exhibition booths to facilitate networking and product demos

## What our Sponsors have to say:

"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 – Past Sponsor**

**For more information to discuss the different ways to get involved for your brand, please contact:**



**Darren Haughian**  
Sponsorship Director  
**Strategy Institute**

**Call:** 1-866-298-9343 x 276

**Email:** [darren@strategyinstitute.com](mailto:darren@strategyinstitute.com)

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Spring 2025

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**Financial Services**  
**Summit** **MIDWEST**

Fall 2025

12th Annual

**Digital Marketing** for  
**Financial Services**  
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Fall 2025



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15th Annual

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**Discover how to maximize ROI** from expertise sharing on how to leverage the latest technologies, data and creative practices.

### Harness AI for Search Ads and More

Uncover how to **adapt to algorithm changes with AI-powered search** to maintain a competitive edge and ensure continued brand visibility.

### Master Data-driven Content Strategy

Unlock insights on blending **data, brand, and behavioral insights** to drive engagement and loyalty.

### Leveraging Agility, Technology, and Data to Drive Growth

Discover how to transform your marketing approach to **data-driven marketing function with AI** at its core to fuel growth and innovation in today's competitive landscape.

### Maximize Networking

Connect with peers and **industry leaders through networking** breakfasts, speed networking, and more.



[customer@strategyinstitute.com](mailto:customer@strategyinstitute.com)



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We have secured a number of rooms at the Summit venue at a discounted rate for our participants.

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