

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**



# A distinctive immersive experience that includes:



**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



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



**Matthew Williams**  
VP  
Goldman Sachs



**Siddharth Vishwanathan**  
Head of Digital Acquisition  
BMO



**Joel Pomerleau**  
Director, Growth Marketing &  
Demand Generation  
BDC



**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



**Nilay Lad**  
Chief Product & Revenue  
Officer  
RBC

# Speaker Preview



... AND MANY MORE!



**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



**Sopana Selvachandran**  
Client Relationships Lead  
Interac



**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



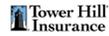
**Taylor Vowell**  
Vice President  
Member Growth  
TDECU



**Christy (Scott) Varicat**  
Director Marketing, CX and  
Digital Transformation  
Tangerine



**Andrew Lo**  
President & CEO  
Embark



# Who Attends?



# 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**, Vice President Marketing, **MetLife, Fiserv, and JPMorgan (former)**  
**Kevin Chan**, VP, North American Marketing, Analytics & Delivery, **TD (former)**  
**Elizabeth Walford**, Founder & Managing Director, **Walford Partners** MODERATOR

## TRACK 1: INDUSTRY EXPERT

## 10:00 AM CONTENT STRATEGY 2.0

### See What You Have Been Missing

Explore innovative approaches and gain valuable insights to transform your content approach. This session will reveal essential strategies to elevate your brand's visibility and effectively engage with your audience in a rapidly evolving digital landscape. Don't miss out on unlocking the full potential of your content strategy

- Identify overlooked areas in your current content strategy and discover the untapped potential to increase your reach and elevate your brand's visibility
- Understand the shifts in content consumption across different platforms and devices, and tailor your strategy to meet the changing needs and preferences of your audience

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

## TRACK 2: INDUSTRY EXPERT

## 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**  
**Viktorii 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](#)  
**Steven Matt**, Vice President Marketing, [MetLife](#), [Fiserv](#), and [JPMorgan \(former\)](#)

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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- Take advantage of **event-specific offers** and special content.

## 1:45 PM INDUSTRY EXPERT

### How To Connect with Your Customers Using Personalized Video, On Their Journey from Acquisition, Conversion, Retention and Loyalty.

As financial customers become more savvy, generic hypotheticals no longer speak to them. Personalizing your messaging can help you to capture your audience's attention at every step of their customer journey.

- Personalized videos help you connect with your customers on an emotional level to allow you to build relationships and goodwill.
- Showing information your customers can relate to will capture and hold their attention throughout their decision-making process.
- Personalized digital marketing will signal to your customers that they're important to you, helping to foster loyalty and word-of-mouth marketing

*Take your digital marketing to the next level and connect with your customers in a more genuine way by offering personalized videos.*

**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**  
**Steven Matt**, Vice President Marketing, **MetLife, Fiserv, and JPMorgan (former)** MODERATOR

### 2:50 PM INDUSTRY EXPERT: FROM INSIGHTS TO ACTION IN A COOKIE LESS WORLD

#### Blend First-And Third-Party Data to Improve Organizational Insights

As the digital marketing world becomes more complex due to media fragmentation, cookie deprecation and more restrictive privacy laws, the marketers' jobs have become significantly more challenging. In this session, Larry Filler, Senior Vice President and Finance Service Practice Lead at Environics Analytics will demonstrate the power of blending of first- and third-party data to improve an organizations insight. He will also discuss how these insights can be actioned through traditional media platforms and how emerging areas like data collaboration and clean rooms can be leveraged to enhance marketing performance and measurement.

**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**  
**Nick Moretta**, Founding Partner, **Other** MODERATOR

# AGENDA - DAY 1

Tuesday, June 11th, 2024

## TRACK 1: CLOSING KEYNOTE

4:15 PM FIRESIDE: DIGITAL PAYMENTS

### Use Digital Payments to Scale your Business

While traditional payment methods can take days or weeks to process and complete, digital payments can be almost instantaneous. By digitizing payments, companies can be better about paying invoices on time, every time. Increase scalability by giving your customers real-time cash flow visibility. Create a blueprint to:

- Turn a cost center to a value driver through digital payments.
- Secure and encrypt transaction data and multi-factor authentication.
- Maintain a stellar reputation for following industry-standard security protocols and protecting your customers' sensitive information

**Sopana Selvachandran**, Solutions Engineering Lead, [Interac](#)  
**Steven Matt**, Vice President Marketing, [MetLife](#), [Fiserv](#), and [JPMorgan \(former\)](#) MODERATOR

## TRACK 2: CLOSING KEYNOTE

4:15 PM FIRESIDE: 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](#)

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

## 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

**Adam Abernathy**, Senior Director, Customer Success Applied Technologies Lab, **Yext**

## 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:*

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.

# AGENDA - DAY 2

Wednesday, June 12th, 2024

## TRACK 1: MARKETING EXCELLENCE

### 11:30 AM PANEL: CUSTOMER ATTENTION ON SOCIAL MEDIA PLATFORM

#### Which Social Media Platform is Best? Maximize Your Customers Attention & Engagement

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.*

**Erin Wilson**, VP, Marketing, **Home Equity Bank**

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

**Mona Afzal**, Director, Enterprise Growth Marketing, **Scotia 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 continual 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**.
- **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 PRIZE

- 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.

# 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**  
**Steven Matt**, Vice President Marketing, **MetLife, Fiserv, and JPMorgan (former)** 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.

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

## 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

14th Annual

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

# Secure Your Spot Now

14th Annual

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

We have a limited number of speaking opportunities and they sell out quickly! Connect with our DMFS community of Intent-Based buyers ready to invest in your solution.



**Book a call** to learn how this opportunity can help you generate new leads and increase your pipeline.



**Darren Haughian**  
Sponsorship Manager

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

## Upcoming Events in this Market Segment

6th Annual

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

October 1st & 2nd, 2024  
Chicago, IL

11th Annual

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

November 7th & 8th, 2024  
New York, NY