

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:



**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**



**Margaret Adaniel**

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

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# 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



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# 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



### MARKETING LEADERSHIP AND CAREER PROGRESSION

Building the Skills and Visibility Needed for Executive Roles.



### ELEVATING ADVISOR POSITIONING IN WEALTH AND ASSET MANAGEMENT

Strengthening Market Presence, Client Engagement, and Thought Leadership



### 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.



### THE PERFECT MARKETING DUO

Blending Field and Digital Tactics for Seamless Customer Journeys.



### DATA-DRIVEN STORYTELLING

Building a Beloved Brand in a Hated Industry.



### DOING MORE WITH LESS

Leveraging Existing Resources to Attract More Customers Today.



### HUMAN-CENTRIC BRAND IN ACTION

Creating Strategies to Build Trust, Loyalty, and Engagement.

**More...**



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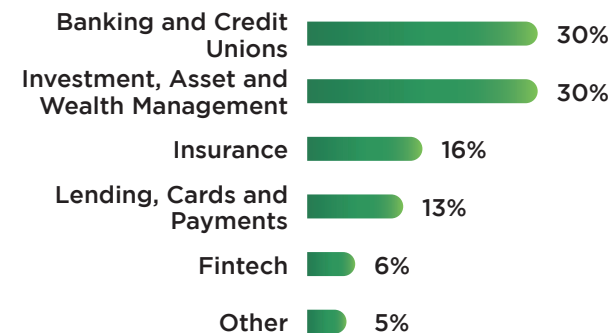
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# Who Attends

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:

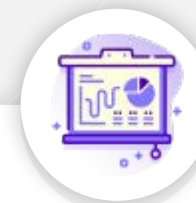
Customer/Client  
Experience, Customer  
Insight & Analytics,  
Customer Journey



### 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,  
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**Katy Dugal Simpson**  
Chief Marketing Officer  
– The Callaway Black  
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Vice President,  
Marketing Programs,  
Payments  
**Chase**



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



**David Kavanagh**  
Assistant Vice President,  
Digital Performance  
Marketing, Growth  
Marketing  
**TD Bank Group**



**Leanne Nullmeyer**

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



**Stella Ladizhinsky**  
Former 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**



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



**Sahar Nezami**  
Vice President,  
Enterprise Analytics &  
Data  
**Meridian Credit Union**



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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**  
Former Director,  
Brand & Acquisition  
**Meridian Credit Union**



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



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



**Anooja Basole**  
Former Head of  
Marketing  
**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**



**Dan Smith**  
CEO & Founder  
**Clearly Financial**



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



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### REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

7:30 AM

### OPENING REMARKS FROM THE CHAIRPERSON

8:45 AM

**Dan Smith**  
CEO & Founder  
**Clearly Financial**



### 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**



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



Led By **Dan Smith**  
CEO & Founder  
**Clearly Financial**



### SPEED NETWORKING

10:15 AM

### INDUSTRY EXPERT PRESENTATION: TAILORED TO FIT

10:30 AM

#### How Calculators and Video Transform Client Experiences Through Personalization

Boost engagement and loyalty by deploying interactive calculators and personalized video that educate, guide, and convert customers at every funnel stage. You will walk away with actionable strategies on:

- Launching interactive financial calculators that capture first-party data and deliver real-time customized insights.
- Integrating personalized video to humanize complex products and drive higher click-through and conversion rates.
- Replicating best-in-class implementations from leading North American institutions that roll out in weeks, not months. .

*Empower your brand to deliver compelling, personalized experiences that accelerate acquisition, deepen relationships, and strengthen retention.*

**Shannon Sloan**

Director, New Business Development

**Rich Media**

**rich**media

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

11:00 AM





11:30 AM

### TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

Led By: **Corby Fine**, Vice President, Digital Marketing & Performance, **IMG Financial**

#### INDUSTRY EXPERT PRESENTATION: MARKETING THAT MINDS ITS MANNERS

##### Employ Old Wisdom and New AI To Grow and Foster Loyalty

The rules and tech behind consumer privacy have evolved but so have your options as a marketer. In this talk, we'll explore how you can leverage the first-party data your organization has to power highly effective marketing without violating your customers' trust. By the end, you'll have:

- Insights into how data can be collected and used in a privacy-first way.
- A shortlist of new AI opportunities that can close the gap left by changes in what data you have and how you can use it.
- Strategies for finding and encouraging loyalty and advocacy among your customers.

*Make use of your data while respecting and protecting the trust your customers place in your brand.*

**Colin Temple**  
Vice President of Product  
**Napkyn**

*napkyn*

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

Led By: **Dan Smith**, CEO & Founder, **Clearly Financial**

#### INDUSTRY EXPERT PRESENTATION: CRACKING GEN AI

##### From Keywords to Conversations in the Future of Search

Unpack the shift from keyword-based strategies to AI-optimized experiences that align with the future of search. You will walk away with insights on:

- Adapting search strategy to AI-driven, conversation-based queries.
- Restructuring content and site experience for intent, context, and personalization.
- Future-proofing digital visibility as search engines integrate generative results..

*Position your brand for the AI-first era of discovery and customer interaction*

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

**iQUANTI**



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.*

##### Madisyn McKee

Vice President, Marketing  
**Canaccord Genuity**



##### Sarah Madden

Growth Marketing & Communications Lead  
**BOXX Insurance**



##### Anooja Basole

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



##### Andrew Marsh

Vice President, Digital Strategy,  
Performance Marketing Strategies  
**SEP**



##### Led By Corby Fine

Vice President, Digital Marketing & Performance  
**IMG Financial**



### 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

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



##### Angelica Montagano

Head of Brand Experience  
**PWL Capital**



##### Steve Whiting

Director, Creative & Digital Marketing  
**HOOPP**



##### Led By Dan Smith

CEO & Founder  
**Clearly Financial**



### NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

1:15 PM

2:15 PM

#### TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

##### INDUSTRY EXPERT PRESENTATION: CENTRALIZED CUSTOMER INTELLIGENCE

###### Centralizing Customer Data to Scale Personalization, Boost Conversions, and Drive Engagement

In this session, you'll learn how one organization activated over 100 advisors with fully automated, personalized communications powered by centralized customer data. The outcome: faster execution, increased conversions, stronger engagement, and measurable impact — with full data control and compliance. You will walk away with:

- A framework to solve operational inefficiencies caused by dispersed customer data
- Strategies to automate advisor-driven campaigns with dynamic segmentation
- Insights on increasing conversions and fidelization while gaining significant time savings

*Turn fragmented data into a foundation for smarter marketing and sustainable results.*

**Benjamin Guay-Marceau**  
Regional Sales Director – Sales & Marketing  
**Dialog Insight**



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

##### INDUSTRY EXPERT PRESENTATION: INSIGHTS TO ACTIVATION

###### Insights, Data Collaboration, Clean Rooms, and Activation for Smarter Engagement

Blend first-party and third-party data to unlock deeper customer insights and drive measurable marketing performance. You'll learn how to transform those insights into action through privacy-safe data collaboration, clean rooms, and advanced measurement frameworks that elevate campaign ROI and customer engagement. You will walk away with actionable strategies to:

- Blend first-party and third-party data for a 360° customer view that supercharges targeting and personalization.
- Leverage secure data collaboration and clean rooms to uncover shared insights and enrich campaigns without compromising customer privacy.
- Implement advanced measurement frameworks that connect insights to marketing outcomes and prove ROI.

*Turn data insights into impactful marketing actions that drive measurable growth in a privacy-first, post-cookie world.*

**Larry Filler**  
Senior Vice President, Sales Leader for Financial Services  
**Environics Analytics**





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.*

#### 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



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### INDUSTRY EXPERT PRESENTATION: PERSONALIZATION, TRUST & COMPLIANCE IN HARMONY

4:00 PM

#### Creating Emotionally Intelligent Customer Experiences in Financial Services

Leverage AI-driven personalization and real-time +engagement to turn transactional digital touchpoints into meaningful moments—without ever compromising regulatory requirements or customer trust. You will walk away with actionable strategies on:

- Delivering hyper-personalized interactions that remain fully compliant and data-secure.
- Infusing the emotional promise of your brand into every channel to deepen connection.
- Unifying data, technology, and teams to build a customer-centric engagement playbook.

*Empower your marketing organization to marry personalization and compliance, transforming digital communications into loyalty-driving experiences.*

#### Nate Frick

Enterprise Strategist Director

Marigold



### 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

Led By **Dan Smith**  
CEO & Founder  
**Clearly Financial**

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

**Pat Bolland**

Head of Advisor Recruitment

**Justwealth Financial**



### 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.*

**David Kavanagh**

Assistant Vice President, Digital Performance Marketing, Growth Marketing

**TD Bank Group**





### INDUSTRY EXPERT PRESENTATION: NEW RULES OF BRAND DISCOVERY

9:30 AM

#### Winning Visibility Across AI Search, Social, and Omnichannel Journeys

Visibility now hinges on relevance, trust signals, and presence across every platform where customers begin their search—from Google to TikTok to ChatGPT. This session reveals how AI, social algorithms, and shifting consumer behaviors are redefining discovery and what financial brands must do to stay ahead. You will walk away with insights on:

- Modernizing search strategy to align with AI-driven experiences and conversational queries.
- Building omnichannel relevance that meets prospects wherever they start their journey.
- Showcasing proof points—reviews, content, social validation—that earn trust and drive next-step actions.

*Equip your brand to thrive in the evolving discovery landscape and convert attention into lasting relationships.*

**James Morse**

Vice President, Product Marketing

**SOCI**



### PANEL DISCUSSION: AI-DRIVEN TRANSFORMATION

10:00 AM

#### 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**



**Sahar Nezami**

Vice President, Enterprise Analytics & Data

**Meridian Credit Union**



Led By **Elizabeth Walford**

Founder & Managing Director

**Walford Partners**



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

10:45 AM

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

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



**C: 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**



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

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



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

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



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

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



### CASE STUDY: MODERN FINANCIAL MARKETING FOR ADVISORS

12:15 PM

#### 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**



### INDUSTRY EXPERT PANEL DISCUSSION: THE HIDDEN COST OF INACTION

12:45 PM

#### Safeguarding Growth, Relevance, and Market Share

Doing nothing can feel safe when budgets tighten or markets wobble—but inertia quietly drains competitive advantage. This session uncovers the financial, brand, and talent losses that accumulate when organizations defer innovation, delay technology upgrades, or stall strategic pivots. You will walk away with insights on:

- Quantifying revenue leakage and rising acquisition costs tied to outdated marketing and customer-experience models.
- Spotting early warning signs of brand stagnation—declining share of voice, digital invisibility, and disengaged talent.
- Building a proactive roadmap that prioritizes low-risk, high-impact moves to maintain momentum even in uncertain climates..

*Learn to identify and eliminate the hidden costs of inaction so your organization can safeguard growth, relevance, and market share.*

#### Mona Champaneri

Senior Vice President

**Valtech**

**valtech\_**

#### Jared Johnson

Digital Transformation Lead

**Valtech**

**valtech\_**

#### Led by Cuneyt Uysal

Senior Account Executive

**Optimizely**



### NETWORKING LUNCH

1:15 PM

### EXHIBITOR LOUNGE VISITS & PRIZE DRAW WINNER ANNOUNCEMENT

2:15 PM

### INDUSTRY EXPERT PRESENTATION: EMPATHY-POWERED GROWTH

2:30 PM

#### Inside the Growth Engine: Strategies for Financial Marketers in the New Banking Era

Chime didn't beat traditional institutions with code; it won by listening. Drawing on RightMetric's data-driven analysis, this session unpacks the empathy-led strategy that turned real financial stress into community loyalty, earning 22 million customers without sacrificing compliance or clarity. You will walk away with insights on:

- Embedding trust into product design and UX to convert pain points into brand affinity.
- Showing up natively on TikTok, Reddit, and creator channels to build cultural relevance at scale.
- Designing for gig workers, newcomers, and hourly earners—and why serving the underserved is the next growth engine.

*Engineer trust from day one and position your brand for durable, community-driven growth.*

**Charlie Grinnell**  
Co-Chief Executive Officer  
**RightMetric**



### PANEL DISCUSSION: DOING MORE WITH LESS

3:00 PM

#### 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 Financial**



**Kevin Press**  
Editorial Director, Investment Executive and Advisor.ca  
**Newcom Media**



Led by **Pat Bolland**  
Head of Advisor Recruitment  
**Justwealth Financial**





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**

Former Head of Marketing

**First West Credit Union**



4:15 PM

### **CLOSING REMARKS & END OF SUMMIT**

#### **Pat Bolland**

Head of Advisor Recruitment

**Justwealth Financial**



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"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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**Summit** **MIDWEST**  
Fall 2025

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### Harness AI for Search Ads and More

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### 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.

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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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