

MODERN MARKETING FOR MODERN FINANCE

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16th Annual
Digital Marketing *for*
**Financial Services
Summit** **CANADA**

JUNE 10-11, 2026 | HYATT REGENCY TORONTO, ON

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[#DMFS2026](#)



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MESSAGE FROM THE PRODUCER

Dear Colleagues,

Welcome to the 16th Toronto edition of the Digital Marketing for Financial Services Summit, the flagship event of our DMFS portfolio. This summit brings together the most **innovative, engaged, and influential marketing leaders driving enterprise outcomes across financial services.**

DMFS is designed to support brand, marketing, and AI leaders across the financial sector 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. Two dedicated tracks will provide you with an actionable plan on how to **accelerate your go-to-market strategy**, harness the power of AI to supercharge your personalization, streamline your MarTech stack without sacrificing efficiency, strengthen your brand voice for a multi generational reach, and find the ideal governance strategy that balances innovation with compliance.

Join us to source best practices from market-leading brands, including **JPMorgan Chase, TD Bank, CST Savings, Manulife, Haventree Bank, Questrade Financial Group, Equitable, BGO, and more.** We look forward to welcoming you into the DMFS community and hosting you this June!



Rebecca Mayoh-Davis
Conference Producer – Digital Marketing for Financial Services
Strategy Institute
rebecca@strategyinstitute.com





SHAPING MARKETING'S FUTURE: STRENGTHENING BRAND TRUST WHILE PROMOTING GROWTH

The **2026 Digital Marketing for Financial Services Canada Summit** promises to be our biggest and best event yet, bringing together top industry leaders, innovators, and experts to explore the future of brand and marketing growth. With expanded sessions, cutting-edge technologies, and unparalleled networking opportunities, this year's summit will set new standards for innovation and collaboration in the ever-evolving marketing landscape.

- ▶ Over two days, explore cutting-edge topics focusing on **securing brand trust, ensuring compliant targeting, and harnessing the power of automation.**
- ▶ Connect with experts from **JPMorgan Chase, TD Bank, Equitable, and CST Savings** across two incredible tracks: Marketing Operations & Digital Enablement and Content, Brand, & Media. From workshops to case studies, master AI scaling, data monetization, and democratization.
- ▶ Join visionaries **transforming marketing campaigns and brand visibility** — and unlock what's next for your organization.

WHY ATTEND?

Discover countless reasons to be part of the 16th edition of this flagship financial marketing event! At DMFS Canada, we're dedicated to crafting a peer-driven experience that delivers two high-impact days - designed to maximize ROI for you and your organization. Here's why you won't want to miss joining us in Toronto in 2026.



STRATEGIC INSIGHTS

Strengthen personalization strategies, prove marketing's impact with cleaner measurement, and build durable operating models that thrive in a regulated environment.



INTERACTIVE WORKSHOPS

Pressure-test ideas with senior peers in expert-led roundtables, participate in practical breakouts, and leave with frameworks you can apply immediately across campaigns, channels, and teams.



NETWORKING

Enjoy a complimentary breakfast with industry peers, plus interactive roundtables, and speed networking. Meet one-on-one with solution providers and experts.



TARGETED CONTENT

Learn how leading banks and insurers are using AI responsibly, modernizing martech stacks without disruption, and building brand trust through smarter data, messaging, and customer journeys.



HAVE FUN

There's plenty to enjoy throughout the summit, including an evening reception with cocktails and prizes. A perfect chance to wind down in a fun and friendly environment.

NETWORK AND HAVE FUN

Networking and fun take centre stage at this year's event, offering the perfect balance of professional connections and social experiences. Start your day with engaging conversations at our networking breakfasts, where you can meet industry peers over coffee and fresh bites. In the evening, unwind at our cocktail reception, where great drinks, lively discussions, and new opportunities come together in a relaxed, social setting.



AGENDA AT A GLANCE

From expert-led sessions and thought-provoking keynote speakers to interactive workshops and networking opportunities, every moment at DMFS Canada is designed to inspire, engage, and equip you with the insights and tools needed to succeed. Prepare for two days filled with innovative ideas, meaningful connections, and valuable takeaways that will elevate your experience and leave you motivated for what lies ahead.

STRATEGIC INSIGHTS

- **Strengthen customer connections** with storytelling campaigns strengthened by AI
- Embrace new channel opportunities for **stronger ROI**
- Embed compliance at the heart of your marketing campaigns to **prevent regulatory missteps**

INTERACTIVE WORKSHOPS

- Deploy a **dual-pronged approach to marketing campaigns** with AI-powered content
- Develop a content strategy that **connects with the audience and aligns with organizational goals**
- **Unite brand consistency and marketing innovation** to support growth and client conversion

WORLD-CLASS CONTENT

- Build scalable, future-proof **growth pipelines**
- Implement **optimized marketing campaigns** across organizations
- **Master MarTech** and AI deployment

NETWORK

- Enjoy **networking opportunities** with industry peers and thought leaders
- Have fun at our **evening reception** with cocktails and prize giveaways
- Schedule **one-on-one meetings** with solution providers and experts

FUTURE TRENDS

- Navigate the ever-changing **regulatory landscape** around AI campaigns and targeting
- **Streamline your implementation journey** to evolve marketing strategies
- Create a brand with a multi-generational reach using **advanced personalization strategies**

WHO ATTENDS?

We pride ourselves on having senior marketing leaders from some of the most recognized financial services brands across the marketing landscape. This is your opportunity to join them and be a part of the incredible story of DMFS Canada 2026.



TESTIMONIALS

Don't just take our word for it! Here's what some of our previous delegates have said about this incredible summit.



It was great to learn from my peers in the finance industry... You won't find a better place to talk shop than here



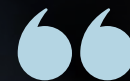
Loved the speakers, food and overall vibe of the conference! Very fun and informative.



An excellent opportunity to network with senior marketing professionals... gained valuable insights and forged meaningful connections...



The DMFS conference was very engaging, informative and relevant to the industry... well organized and had great speakers.



Working in the financial industry provides unique challenges... having access to a conference filled with speakers and other attendees who 'get it' is invaluable!



Very knowledgeable and transparent speakers where you are able to learn and see how to apply.



SPEAKER LINE UP

[MANY MORE](#) ↗

Our agenda is delivered by the best marketing experts across the financial services industry. Not only will you get to hear from world-class speakers at the top of their game, but you also get to meet and network with them.



Selina Wang
Vice President,
Marketing Programs,
Payments
JPMorgan Chase



**Martha Turner
Osbourne**
Chief Sales & Marketing
Officer
Hub Financial



Kate Brown
Chief Marketing Officer
Insurely



Anthony V. Lambie
AVP, Marketing
Technology, North
America
TD



Jeffrey Beck
Chief Marketing Officer
CST Savings



Brittany Wilson
Chief Marketing Officer
Haventree Bank



Kerry Ould
Chief Marketing &
Communications Officer
PenFinancial Credit
Union



Veronica Farmer
Chief Marketing Officer
Wesley Clover



Caleb Rubin
Chief Marketing Officer
Questrade Group



Iris Oberlaender
Director, Global Digital
Marketing Strategy &
Experience Enablement
Manulife

SPEAKER LINE UP

[MANY MORE](#) ↗

Our agenda is delivered by the best marketing experts across the financial services industry. Not only will you get to hear from world-class speakers at the top of their game, but you also get to meet and network with them.



Med Yacoub
Marketing Director
Tradesk



Taylor Stavenjord
AVP, Brand Impact &
Creative Services
Equitable



Michael Letsche
VP, Marketing
TD Wealth



Brent Merriman
Vice President,
Marketing & Strategic
Insights
CIBC Mellon



Phillip De Souza
VP, Communications &
Marketing
Health Care Insurance
Reciprocal of Canada



Rahim Ladha
Managing Director
& Global Head of
Communications
BGO



Joe Pelligrino
Director, Digital
Marketing
Manulife



Baaba Hughes
Social Media Director
Adelaide Capital



Emily Utting
AVP, Marketing &
Corporate Comms
Atrium Mortgage
Investment Corporation



Aparna Allam
Head of Marketing
Espresso Capital

FULL AGENDA

DAY 1 - Wednesday, June 10, 2026

7:30 AM REGISTRATION & 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 REMARKS FROM THE CHAIRPERSON

Gain insight into today's sessions so you can get the most out of your conference experience.

9:00 AM KEYNOTE: MARKETING 2030

Preparing for a Decade of Customer-Driven Change

Discover how financial services marketers can prepare for the next decade of customer-driven change. Leverage emerging technologies, embedding marketing strategically, and build trust to deliver meaningful experiences and business impact. Adopt best practices to:

- Anticipate and respond to evolving customer expectations in a digital-first, experience-driven world.
- Leverage emerging technologies, such as AI, ethically and strategically.
- Unlock insights to drive growth and deliver measurable impact across campaigns and channels.

Advance your marketing strategy with the tools, approaches, and mindset needed to drive growth and trust in a rapidly evolving market.

9:30 AM PANEL DISCUSSION: TRANSFORMING MARKETING INTO A PROVEN GROWTH ENGINE

Shifting Perceptions to Prove Value and Accelerate Revenue

Reframe, measure, and communicate your marketing department's impact across teams. Demonstrate strategic growth and secure lasting buy-in from the business. Master the success factors to:

- Examine practical ways to tie marketing activity directly to revenue, pipeline quality, and customer lifetime value.
- Develop frameworks to build a data-driven story that secures buy-in from CFOs and business unit leaders.
- Uncover tools and metrics that move your team from a "cost centre" to an "ROI-positive growth partner."

Transform marketing's role to influence investment decisions and deliver measurable business growth.

Joe Pelligrino, Director, Digital Marketing, [Manulife](#)

Brittany Wilson, Chief Marketing Officer, [Haventree Bank](#)

Caleb Rubin, Chief Marketing Officer, [Questrade Group](#)

10:15 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**.
- **Join a community** of big data leaders and gain invaluable support.

10:30 AM INDUSTRY EXPERT PRESENTATION: TAILORED TO FIT

How Interactive Calculators and Video Transform Client Experiences Through Personalization

Boost engagement and loyalty by deploying interactive calculators and personalized videos that educate, guide, and convert customers at every stage of the funnel. Walk away with an action plan on:

- Launching interactive financial calculators that capture first-party data and deliver real-time, customized insights.
- Integrating personalized video experiences 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.

Amplify your brand's ability to deliver compelling, personalized experiences that accelerate acquisition, deepen relationships, and strengthen retention.

11:00 AM REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of digital marketing innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas

11:30 AM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

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

**Employ Old Wisdom and Modern
AI to Grow and Foster Loyalty**

The rules and tech behind consumer privacy have evolved but so have your options as a marketer. Leverage the first-party data your organization already has to power highly effective marketing while maintaining your customers' trust. Source practical tips to:

- Gain insights into how data can be collected and used in a privacy-first way.
- Identify new AI opportunities that help close the gap created by changes in data availability and usage.
- Apply strategies to build, encourage, and sustain customer loyalty and advocacy.

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

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

**INDUSTRY EXPERT
PRESENTATION: CRACKING GENAI**

**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. Develop a blueprint to:

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

Advance your brand for the AI-first era of discovery and customer interaction.

12:00 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

**FIRESIDE CHAT: SCALING
PERSONALIZATION TO DRIVE HIGH-
IMPACT MARKETING ACROSS
CHANNELS**

**Building Insight-Led, Privacy-Forward
Personalization Strategies**

Deliver relevant, timely, and consistent personalization at scale while maintaining trust, transparency, and operational efficiency. Understand how to apply data, technology, and insight to strengthen engagement, improve performance, and drive measurable business impact. Take back to your office strategies to:

- Balance automation and creative strategy to enhance relevance without losing authenticity.
- Translate customer data and signals into actionable insights for targeting and messaging.
- Embed privacy, consent, and responsible data use at every stage of the personalization workflow.

Bolster your personalization capabilities to drive stronger engagement, deeper loyalty, and measurable growth.

Anthony V. Lambie, AVP Marketing Technology, North America, [TD](#)

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

**CASE STUDY: 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. Explore the shifts in creative execution, the evolution of video marketing, and how to leverage storytelling to stand out in a crowded media landscape. Adopt best practices to:

- Bring creative capabilities 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.

Taylor Stavenjord, AVP, Brand Impact & Creative Services, [Equitable](#)

12:30 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

PANEL DISCUSSION: NEW RULES OF BRAND DISCOVERY

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. Uncover how AI, social algorithms, and shifting consumer behaviours are redefining discovery and what financial brands must do to stay ahead. 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, including reviews, content, and 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.

Baaba Hughes, Social Media Director, **Adelaide Capital**

Martha Turner Osbourne, Chief Sales & Marketing Officer, **Hub Financial**

Veronica Farmer, Chief Marketing Officer, **Wesley Clover**

TRACK B: CONTENT, BRAND, & MEDIA

PANEL DISCUSSION: BRAND BUILDING IN A DISTRUSTFUL ERA

Designing a Financial Brand People Believe In

Build trust, differentiate your brand, and resonate with customers in a highly sceptical environment. Align purpose, messaging, and customer experience to create a brand that inspires confidence and loyalty. Achieve a step-by-step action plan to:

- Align brand purpose with customer expectations to create relevance and authenticity.
- Modernize your brand without losing heritage or equity.
- Embed consistency across channels, campaigns, and customer touchpoints for maximum impact.

Enrich your brand to build trust, deepen relevance, and drive measurable business impact.

Rahim Ladha, Managing Director & Global Head of Communications, **BGO**

Carolina Medrano, Director, Marketing, **Get a Better Mortgage Inc.**

Kerry Ould, Chief Marketing & Communications Officer, **PenFinancial Credit Union**

Isabel Tremblay, Head of Marketing, Canada, **RBC Wealth Management**

MODERATOR

1:15 PM

NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

- 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**.

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

Discover 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. Master the success factors to:

- Building a framework to solve operational inefficiencies caused by dispersed customer data.
- Implement strategies to automate advisor-driven campaigns with dynamic segmentation.
- Leverage insights on increasing conversions and fidelity while gaining significant timesavings.

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

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. Transform those insights into action through privacy-safe data collaboration, clean rooms, and advanced measurement frameworks that elevate campaign ROI and customer engagement. Walk away with an action plan on:

- Blending first-party and third-party data for a 360° customer view that enhances targeting and personalization.
- Leveraging secure data collaboration and clean rooms to uncover shared insights and enrich campaigns without compromising customer privacy.
- Implementing advanced measurement frameworks that connect insights to marketing outcomes and demonstrate ROI.

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

2:45 PM

WORKSHOPS (45 mins) (Please select one)

Break into smaller groups of approximately 25 industry peers to work through practical hands-on exercises that will strengthen your role as a marketing leader within your organization.

WORKSHOP 1: MARKETING LEADERSHIP & CAREER PROGRESSION

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 that leadership requires a different set of competencies. Explore how to chart a clear growth path, develop the leadership skills essential for senior roles, and cultivate sponsorship that accelerates career progression. Take back to your office strategies to:

- Identify leadership gaps and proactively address them to transition from tactical to strategic influence.
- Seek and secure sponsorship from senior leaders to open new opportunities and broaden your visibility.
- Build the purpose-led identity, confidence, and communication skills needed to thrive at the executive level.

Improve your leadership skills to break through career plateaus, elevate your leadership impact, and shape your journey in modern marketing.

Brent Merriman, Vice President, Marketing & Strategic Insights, **CIBC Mellon**

OR

WORKSHOP 2: ELEVATING ADVISOR POSITIONING IN WEALTH & ASSET MANAGEMENT

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. Source strategic insights into crafting a compelling value proposition, positioning in local markets, and using content-driven storytelling to strengthen the advisor-client connection. Create a roadmap to:

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

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

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

OR

WORKSHOP 3: UTILIZING AI WITHOUT LOSING THE HUMAN TOUCH

Transforming Content Production While Preserving Brand Integrity and Human Insight

Enhance production speed, expand content volume, and elevate quality while keeping brand authenticity at the centre of your business. Cut through the hype to show how AI can strengthen creative output, not replace it. Source your plan of action by:

- Optimizing performance creative through rapid testing, iteration, and insight generation.
- Blending AI and human creativity to enhance content development without compromising brand voice or trust.
- Establishing governance and guardrails that ensure responsible, compliant, and brand-safe use of AI tools.

Amplify AI as a catalyst for smarter, faster, and more human creative marketing.

3:30 PM

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest digital marketing technology and strategies with our industry-leading sponsors.
- Share your challenges with the biggest innovators in the business.
- Schedule one-to-one private meetings for personalized advice.

3:55 PM

EVALUATIONS

4:00 PM

INDUSTRY EXPERT PRESENTATION: PERSONALIZATION, TRUST & COMPLIANCE IN HARMONY

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. Develop a blueprint to:

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

Heighten your marketing organization's ability to align personalization with compliance, transforming digital communications into loyalty-driving experiences.

FULL AGENDA

DAY 1 - Wednesday, June 10, 2026

4:30 PM CASE STUDY: GRASSROOTS MARKETING

Creating a Home-Grown Marketing Strategy that Resonates with Your Brand

Engage the local community to drive engagement beyond digital platforms. Adopt best practices to:

- Establish campaigns that connect with the community and build organic relationships that convert into new clients.
- Create a story that involves the consumer in a journey, increasing customer loyalty.
- Gain a competitive edge by establishing yourself as the preferred, trusted local partner for financial needs.

Increase your ability to create a regional brand that really connects to the local community and inspires consumer loyalty.

Jeffrey Beck, Chief Marketing Officer, [CST Savings](#)

5:00 PM END OF DAY ONE SUMMARY & CLOSING REMARKS

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!

5:05 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** by scanning your badge at our exhibitor booths.
- Make dinner plans with your **new connections** and explore the best of what Charlotte nightlife has to offer. Just be sure to set your alarm for day two!

6:00 PM CONFERENCE ADJOURNS TO DAY 2



FULL AGENDA

DAY 2 - Thursday, June 11, 2026

8:00 AM DAY TWO REGISTRATION & 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.

8:50 AM OPENING REMARKS FROM THE CHAIRPERSON

Gain insight into today's sessions so you can get the most out of your conference experience.

9:00 AM CASE STUDY: MARKETING AT THE SPEED OF CHANGE

Driving Agility in Financial Services

Examine how agile marketing enables financial institutions to respond faster, improve execution, and strengthen customer and business outcomes. Understand how leading teams apply rapid testing, flexible planning, and cross-functional alignment to stay ahead in a shifting landscape. Walk away with practical takeaways to:

- Build agile marketing teams capable of responding quickly to changing market conditions.
- Balance innovation with regulatory and compliance requirements while maintaining speed.
- Embed a culture of experimentation and learning to continuously improve strategies and customer outcomes.

Equip yourself with the tools and mindset to move fast, stay relevant, and deliver measurable impact in financial services.

9:30 AM PANEL DISCUSSION: GOVERNING CUSTOMER DATA IN CANADA'S OPEN BANKING ERA

Enabling Trust, Transparency, and Customer-Centric Marketing without Monetizing Data

Prepare for a future of customer-owned data and open banking while ensuring responsible, ethical marketing. Leverage data to enhance customer experiences, insights, and engagement without compromising trust. Take away specific solutions to:

- Prepare for open banking and evolving regulatory requirements without disrupting core marketing initiatives.
- Leverage data ethically to drive insights, personalization, and engagement.
- Put customers in control of their data while enabling meaningful, value-driven marketing interactions.

Achieve a marketing strategy that is trust-driven, customer-first, and future-ready in Canada's evolving financial services landscape.

10:00 AM PANEL DISCUSSION: EMOTIONAL STORYTELLING MEETS TECH-DRIVEN EFFICIENCY

Merging Empathy and Innovation to Win Hearts and Minds

Create campaigns that appeal to the emotional pull of your customers. Utilize AI-enabled automation to deliver on brand promises. Source best practices to:

- Balance high-impact brand campaigns that evoke aspirations with practical messaging around speed and simplicity.
- Leverage AI-driven tools to fulfill brand promises of seamless customer experiences.
- Engage both direct consumers and broker partners through tailored digital platforms, reinforcing a multi-channel growth strategy.

Advance your brand's impact by blending emotional appeal with innovative technology to drive customer loyalty and measurable business results.

Kate Brown, Chief Marketing Officer, [Insurely](#)

Michael Letsche, VP, Marketing, [TD Wealth](#)

Jeffrey Beck, Chief Marketing Officer, [CST Savings](#)

Phillip Notley, Head of Marketing & Communications, [FCT](#) MODERATOR

10:45 AM REFRESHMENTS BREAK & EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- 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.

11:15 AM ROUNDTABLE DISCUSSIONS (45 MINS) (PLEASE SELECT ONE)

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

B: DOING MORE WITH LESS: Leveraging Existing Resources to Attract More Customers Today

C: HUMAN-CENTRIC BRANDS IN ACTION: Creating Strategies to Build Trust, Loyalty, and Engagement

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

E: AFFILIATE & PARTNER MARKETING: Leveraging Relationships to Differentiate Your Brand and Grow Your Customer Base

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

12:00 PM PANEL DISCUSSION: ELEVATE MARKETING TO THE STRATEGIC CORE OF THE BUSINESS

Shape Enterprise Decisions, Growth, and Customer Outcomes

Uncover the benefits of embedding marketing at the strategic core of your organization to influence planning, guide decision-making, and strengthen customer and business outcomes. Dive into how top teams align insights, brand, digital, and CX to shape enterprise priorities and accelerate growth. Benchmark proven strategies to:

- Redefine marketing's role as a core contributor to strategy, growth, and commercial performance.
- Shape culture and governance to elevate marketing's influence and support customer-first execution.
- Embed customer insights and data into enterprise planning to drive more informed decisions.

Elevate your marketing function into a strategic engine that drives clarity, cohesion, and competitive advantage across the organization.

Aparna Allam, Head of Marketing, [Espresso Capital](#)

Emily Utting, AVP, Marketing & Corporate Comms, [Atrium Mortgage Investment Corporation](#)

Angelica Montagano, Head of Brand Experience, [PWL Capital](#)

Iris Oberlaender, Director, Global Digital Marketing Strategy & Experience Enablement, [Manulife](#) MODERATOR

12:30 PM INDUSTRY EXPERT PANEL DISCUSSION: THE HIDDEN COST OF INACTION

Safeguarding Growth, Relevance, and Market Share

Doing nothing can feel safe when budgets tighten or markets wobble — but inertia quietly drains competitive advantage. Uncover the financial, brand, and talent losses that accumulate when organizations defer innovation, delay technology upgrades, or stall strategic pivots. Leave with key 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.

Identify and eliminate the hidden costs of inaction so your organization can safeguard growth, relevance, and market share.

1:00 PM NETWORKING LUNCH & EXHIBITOR LOUNGE: 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 **marketing colleagues**.

2:00 PM EXHIBITOR LOUNGE VISITS & PRIZE DRAW WINNER ANNOUNCEMENT

- Enjoy **exclusive sponsor demos** and experience the next level of digital marketing innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

2:15 PM INDUSTRY EXPERT PRESENTATION: 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, unpack the empathy-led strategy that turned real financial stress into community loyalty, earning 22 million customers without sacrificing compliance or clarity. Master the success factors to:

- Embed trust into product design and UX to convert pain points into brand affinity.
- Appear natively on TikTok, Reddit, and creator channels to build cultural relevance at scale.
- Design 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.

2:45 PM PANEL DISCUSSION: NAVIGATING GROWTH & INNOVATION IN A MATURE FINANCIAL MARKET

Redefining the Future of Banking in a Concentrated Market

Discover how Canadian financial institutions and emerging fintechs are innovating to meet evolving customer expectations and driving growth in a highly concentrated banking market. Identify opportunities, leverage technology, and collaborate across the ecosystem to stay ahead. Build a roadmap to:

- Identify growth opportunities that respond to evolving customer needs.
- Collaborate across the ecosystem to accelerate innovation.
- Scale strategically without losing focus on customer experience or competitive priorities

Turn market maturity into a platform for innovation, collaboration, and long-term growth.

Selina Wang, Vice President, Marketing Programs, Payments, [JPMorgan Chase](#)

Phillip DeSouza, Vice President, Communications & Marketing, [Health Care Insurance Reciprocal of Canada](#)

FULL AGENDA

DAY 2 - Thursday, June 11, 2026

3:30 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. Draw from real-world examples from credit unions to digital to traditional financial services and explore strategies to optimize resources through data-driven targeting, personalization, and CRM strategies. Take away 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.

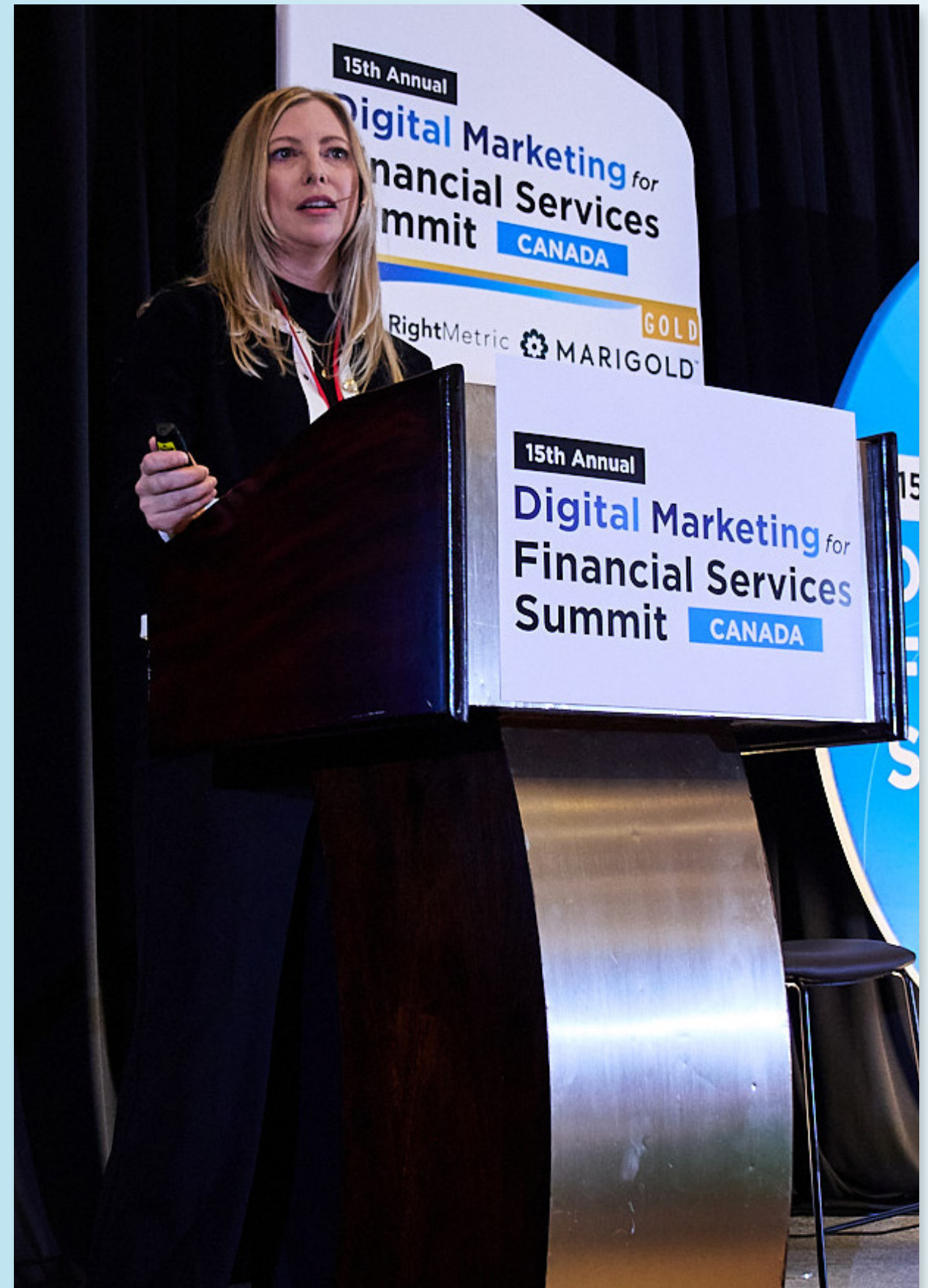
Discover how to make your marketing dollars work harder with smarter strategies that deliver lasting impact.

Sarah Madden, Growth Marketing & Communication Lead, **BOXX Insurance**

4:00 PM CLOSING REMARKS & END OF SUMMIT

Review the key solutions and takeaways from the conference. Source a summary of action points to implement in your work.

4:15 PM CONFERENCE CONCLUDES



HOW TO REGISTER?

[REGISTER NOW](#) ↗

IN-PERSON PASS

FULL TWO-DAY ACCESS:

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables, and one week of pre-event networking via our dedicated platform

FACE-TO-FACE NETWORKING:

Connect and build valuable relationships with our audience of thought leaders

5-STAR TREATMENT:

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location

EXPO HALL:

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

SPEAKER PRESENTATIONS:

Take home PowerPoints and white papers addressing your biggest challenges

ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event

SUPER EARLY BIRD
EXPIRES ON FEB 20, 2026

\$995

REGULAR TICKET

\$1,695

VIRTUAL PASS

TWO-DAY LIVE STREAM ACCESS:

Tune into keynote sessions, panel discussions and case studies with real-time Q&A from the comfort of your home

VIRTUAL NETWORKING:

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool

VIRTUAL EXPO HALL:

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

SPEAKER PRESENTATIONS:

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SUPER EARLY BIRD
EXPIRES ON FEB 20, 2026

\$795

REGULAR TICKET

\$1,395

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Contact:

Sam Caskey

Delegate Registration Manager

Email: sam.caskey@strategyinstitute.com

GROUP RATES

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16th Annual

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

JUNE 10-11, 2026

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