

16th Annual

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

# Post Event Report

June 12 & 13, 2025

Sheraton Centre Toronto Hotel



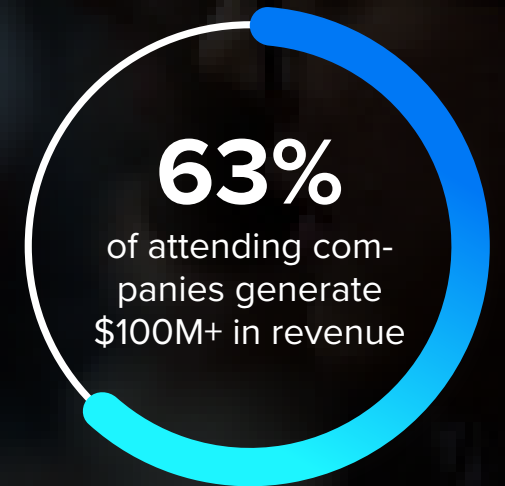
Brought to you by:



**The Canadian Summit on Digital Marketing for Financial Services** is where Canada's foremost financial services marketing leaders, digital innovators, and customer experience executives unite to shape the future of data-driven, customer-first marketing.

The **2025 Summit** brought together decision-makers from banking, insurance, wealth and asset management, fintech, payments, and credit unions for two intensive days focused on maximizing ROI, elevating personalization, and driving measurable growth in an era of rapid digital transformation. From harnessing AI-powered search and data-driven storytelling to balancing compliance with hyper-personalization and scaling agile marketing organizations, the event delivered the strategies and tools to strengthen brand visibility, deepen customer trust, and future-proof marketing.

Anchored in today's evolving financial marketing landscape—from shifting customer expectations and privacy regulations to the disruptive impact of generative AI, analytics, and omnichannel engagement—the Summit served as the essential forum for advancing marketing excellence across the industry. Through keynotes, case studies, expert panels, workshops, and interactive roundtables, attendees gained actionable insights into content strategy, customer engagement, demand generation, and building resilient, growth-focused marketing functions equipped to thrive in today's competitive environment.



# DMFS in Numbers



**221**  
On-Site  
Attendees



**42**  
Expert  
Speakers



**20+**  
Hours of Innovative  
Content



**10+**  
Hours  
Networking



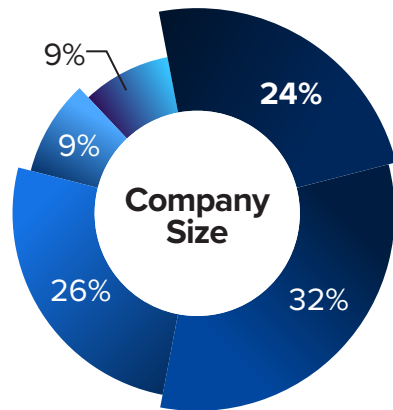
**82%**  
Overall Sponsor  
Evaluation Score



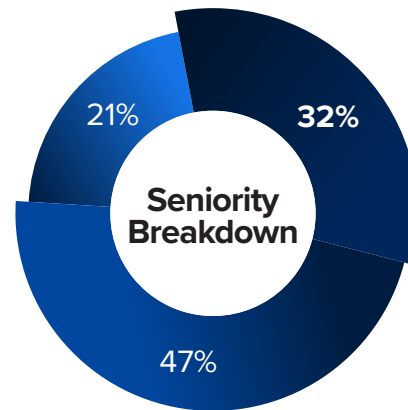
**51%**  
of attendees from  
banking & insurance  
companies



**56%**  
of companies have  
1,000+ employees

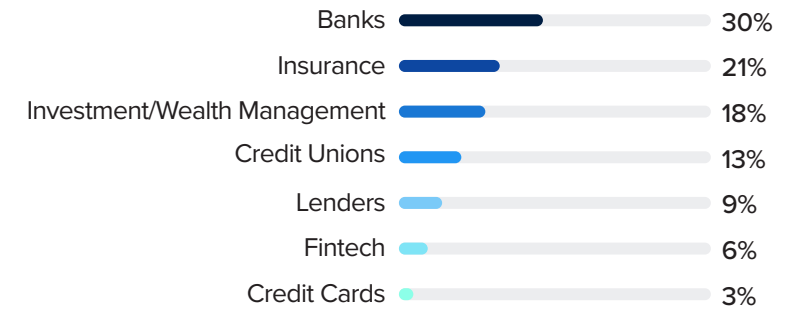


- 24% 5,000+ Employees
- 32% 1001-5,000 Employees
- 26% 201-1000 Employees
- 9% 50-200 Employees
- 9% Under 50 Employees



- 32% VP/C-Suite
- 47% Director/ Manager
- 21% Specialist

## MARKET SEGMENTS



# Hear From Our **DMFS Canada** Community



It was great to learn from my peers in the finance industry. Having a niche audience of marketers who work in finance is really great. You won't find a better place to talk shop than here.



Great event so far, insightful sessions and very informative discussions.



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



An excellent opportunity to network with senior marketing professionals. I gained valuable insights and forged meaningful connections that I'm excited to build on.



Valuable, impactful insights aligning with the challenges of today and future forecasting



# Discover, Network, Transform



## Network

Marketing executives, digital leaders, and customer experience strategists share real-world case studies and actionable strategies for driving growth—covering AI-powered personalization, data-driven storytelling, agile marketing operations, demand generation, brand visibility, and technology adoption across the financial services sector.

## Discover

Connect with a high-caliber community of CMOs, VPs, directors, and digital marketing leaders through curated networking experiences—keynote panels, speed networking, interactive roundtables, exhibitor lounges, and informal meetups that foster collaboration across banking, insurance, wealth management, payments, fintech, and credit unions.

## Transform

Learn from the changemakers shaping the future of digital marketing in financial services. Whether leveraging AI for smarter engagement, modernizing search for brand discovery, balancing personalization with compliance, or building agile, growth-focused organizations, the Canadian Summit on Digital Marketing for Financial Services equips you with the insights, tools, and peer connections to maximize ROI, strengthen brand trust, and lead in a competitive marketplace.

# 2025 Themes: Advancing Financial Marketing Through Innovation, Personalization & Growth

The **2025 Canadian Summit on Digital Marketing for Financial Services** brought together Canada’s top marketing executives, digital leaders, and customer experience innovators to address the defining challenges—and transformative opportunities—reshaping the future of financial services marketing. Against a backdrop of evolving consumer expectations, stricter privacy regulations, and disruptive technologies like generative AI, one message was clear: building customer trust and driving measurable growth requires bold strategies, cutting-edge tools, and a culture of agility at every level.

The insights exchanged didn’t just inform—they offered a blueprint for how banks, insurers, wealth managers, fintechs, and credit unions can modernize engagement, personalize experiences, and future-proof their brands in an increasingly competitive and complex landscape.

## 5 Big Trends from the Canadian Summit on DMFS 2025:

### 1 Embedding Agility into Marketing Culture

Leaders shared proven strategies for transforming marketing from a support function into a growth engine—building agile teams, aligning with business objectives, and fostering cross-functional collaboration.

### 2 Harnessing AI & Data for Personalization at Scale

From AI-powered search and predictive analytics to privacy-first personalization, technology emerged as the catalyst for delivering tailored experiences that drive loyalty and ROI.

### 3 Maximizing Impact with Limited Resources

Speakers emphasized practical strategies for “doing more with less”—optimizing budgets, leveraging automation, and activating multi-channel campaigns that deliver measurable results.

### 4 Redefining Content & Brand Storytelling

Sessions highlighted how data-driven storytelling, influencer-first content strategies, and human-centric branding are setting financial institutions apart in a crowded media landscape.

### 5 Balancing Compliance with Customer Trust

Case studies demonstrated how organizations are navigating evolving privacy rules and regulatory requirements while still delivering hyper-personalized, emotionally intelligent engagement that builds long-term trust.

[VIEW OUR DMFS C CONTENT HUB](#) →

# Our Speakers

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**Chris Hewitt**

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

**Sun Life**



**Katy Dugal Simpson**

Chief Marketing Officer – The Callaway Black Group

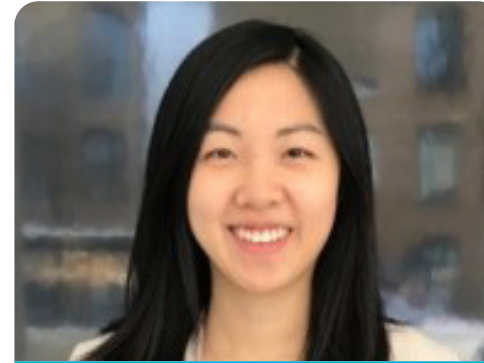
**Northwestern Mutual**



**Kate Brown**

Chief Marketing Officer

**Insurely**



**Selina Wang**

Vice President, Marketing Programs, Payments

**Chase**



**Margaret Adaniel**

Vice President, Digital, Marketing & Communications

**CIBC**



**David Kavanagh**

Assistant Vice President, Digital Performance Marketing, Growth Marketing

**TD Bank**



**Corby Fine**

Vice President, Digital Marketing & Performance

**IGM Financial**



**Leanne Nullmeyer**

Assistant Vice President, Marketing, Mass Affluent

**IG Wealth Management**



**Stella Ladizhinsky**

Former Managing Director, Brand & Marketing Strategy

**Questrade Financial Group**



**Adiela Aviram**

Assistant Vice President, Head of Marketing, Affinity Markets

**Manulife**

# Our Speakers

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**Susan LeBlanc**

Vice President, Marketing  
**Meridian Credit Union**



**Sahar Nezami**

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



**Madisyn McKee**

Vice President, Marketing  
**Canaccord Genuity**



**Lara Coleman**

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



**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**

# Our Speakers

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



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



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



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



**Elizabeth Walford**  
Founder & Managing Director  
**Walford Partners**



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



**Colin Temple**  
Vice President, Product  
**Napkyn**



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



**Nate Frick**  
Enterprise Strategist Director  
**Marigold**



**James Morse**  
Vice President, Product  
Marketing  
**SOCI**

# Our Speakers

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**Shannon Sloan**

Director, New Business  
Development

**Rich Media**



**Larry Filler**

Senior Vice President, Sales  
Leader for Financial Services

**Environics Analytics**



**Charlie Grinnell**

Co-Chief Executive Officer

**RightMetric**



**Wayne Cichanski**

Vice President, Search & Site  
Experience

**iQuanti**



**Mona Champaneri**

Senior Vice President

**Valtech**



**Jared Johnson**

Digital Transformation Lead

**Valtech**



**Michael Thompson**

Senior Account Executive

**Optimizely**

# Activations and Experiences to Inspire and Energize



## Speed Networking

High-energy, timed sessions that maximize introductions — meet new peers, exchange cards, and spark quick connections

## Roundtables

Fast-paced networking rounds designed to spark valuable introductions and share fresh ideas in minutes.

## VIP Breakfast, Lunch and Dinner Briefings

Meet one-on-one with leading solution providers and explore the latest data tools and technologies.

## Evening Reception

Relaxed breakfast and lunch gatherings that make it easy to start meaningful conversations and build lasting connections.

# 2025 Attending Organizations: Advancing Financial Marketing Through Innovation, Personalization & Collaboration

The **2025 Canadian Summit on Digital Marketing for Financial Services** brought together a powerful cross-section of Canada's financial marketing ecosystem—banks, insurers, wealth and asset managers, credit unions, fintechs, payments providers, technology innovators, and solution partners. United by a shared commitment to driving customer growth and building trusted, data-driven engagement, these organizations explored forward-looking approaches to AI-powered personalization, content strategy, agile marketing operations, and omnichannel brand visibility in a rapidly evolving marketplace.

Their participation underscores the DMFS Summit's role as Canada's leading forum for advancing financial marketing excellence, fostering cross-sector collaboration, and shaping the future of the industry through innovation, compliance, and strategic leadership.

## Some of the influential organizations who joined us:

- CIBC
- TD Bank Group
- Canada Life
- Chase
- Insurely
- Northwestern Mutual
- Meridian Credit Union
- IG Wealth Management
- Manulife
- Questrade Financial Group
- Park Place Financial
- FS Investments
- BOXX Insurance
- Canaccord Genuity
- HOOPP (Healthcare of Ontario Pension Plan)
- First West Credit Union
- PWL Capital
- Justwealth Financial
- CPAMD
- MaxMyInterest
- Clearly Financial
- Optimizely
- Valtech
- RightMetric
- Napkyn
- Environics Analytics
- Rich Media
- Marigold
- SOCI

# Our Sponsors

Connect with the organizations shaping the future of financial services marketing, digital innovation, and customer engagement.

These sponsors play a pivotal role in advancing marketing excellence, enabling cutting-edge technologies, and fostering collaboration across Canada's banking, insurance, wealth management, fintech, payments, and credit union sectors. By supporting forward-thinking solutions and driving continuous improvement, they empower financial institutions to harness AI and data, personalize engagement at scale, strengthen brand trust, and achieve measurable growth in a rapidly evolving marketplace.



# How to Register?

## 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.

<b>EARLY BIRD</b> EXPIRES ON MAR 27, 2026	<b>\$1,995</b>
<b>REGULAR TICKET</b>	<b>\$1,695</b>

## 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:

Take home PowerPoints and white papers addressing your biggest challenges.

### ON-DEMAND ACCESS:

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<b>EARLY BIRD</b> EXPIRES ON MAR 27, 2026	<b>\$895</b>
<b>REGULAR TICKET</b>	<b>\$1,395</b>

**REGISTER NOW** →

## REGISTER FOR DELEGATE PASS

Contact:

**Sam Caskey**

Delegate Registration Manager

Email: [sam.caskey@strategyinstitute.com](mailto:sam.caskey@strategyinstitute.com)

## GROUP RATES

Enhance your team collaboration, ROI, and industry presence with our existing group discounts for groups of 3+.

Speak with **Sam** about our best rates:

Email: [sam.caskey@strategyinstitute.com](mailto:sam.caskey@strategyinstitute.com)

**16th Annual**

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

**June 10-11, 2026**

Hyatt Regency Toronto, Toronto, ON