

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

June 10 & 11, 2026
Hyatt Regency Toronto

Practical Growth Playbooks for Financial Marketing Leaders



The leading summit for marketing leaders building measurable growth in Canadian financial services.

The DMFS Canada Summit brings together senior marketing leaders from banking, insurance, wealth management, and fintech to tackle the field's most persistent challenges: proving ROI, building brand trust, and scaling content without losing authenticity. Two days of implementation-focused sessions designed for practitioners who are accountable for real commercial results.

Every session is built around doing, not just listening. Expect facilitated workshops where you build frameworks, panel discussions that surface what's actually working across peer organizations, and roundtables where you can pressure-test ideas with people facing the same constraints. You'll leave with practical tools, not just inspiration.

2026 Summit **Highlights**

01

Big content density

20+ hours of programming with 40+ speakers and 10+ hours of networking built in.

03

C-suite growth perspective

Hear how leaders strengthen brand purpose and resilience amid economic uncertainty.

05

Compliance-ready storytelling

Build campaigns that are captivating while staying aligned with industry requirements.

07

Interactive peer connection

Roundtables, breakouts, and face-to-face networking (including speed networking).

02

Proven attendee experience

93% overall attendee satisfaction across DMFS events sets the bar for quality.

04

Modern audience strategy

Sharpen targeted campaigns that resonate with the next generation of financial customers.

06

Data + MarTech for personalization

Take home strategies to integrate platforms and deliver personalized engagement.

08

Full experience, flexible access

Breakfast/lunch/drinks reception onsite, plus virtual streaming for accessibility.

Is Your Role Here?

If you work in any of the functions below, you'll take away practical strategies, frameworks, and peer-led insights you can apply immediately.

Digital Growth & Performance

Digital Marketing, Growth, Performance, Acquisition, Paid Media

Brand, Content & Customer

Brand, Content, CX, CRM/Lifecycle, Social, Creative

Marketing Intelligence & Ops

Marketing Ops, MarTech, Analytics, Data, Personalization, AI

Senior Leadership

CMO, VP Marketing, AVP Marketing, Head of Marketing & Communications



Register Now →

Trusted by Leading Financial Institutions

Delegates are senior marketing practitioners: directors, VPs, CMOs, and heads of marketing from banking, insurance, wealth management, payments, and fintech. This is a working audience: people accountable for brand performance, pipeline contribution, and commercial growth, not a conference crowd looking for inspiration.

Recent DMFS delegates and speakers include leaders from:



What Past Attendees Say

Don't just take our word for it! Here's what past delegates say about the takeaways, connections, and ROI.

It was great to learn from my peers in the finance industry. Having a niche audience of marketers who work in finance is incredibly valuable—you won't find a better place to talk shop.



The DMFS conference was engaging, informative, and highly relevant to the industry. It was well organized with excellent speakers. I'm already looking forward to the next one.



This conference exceeded my expectations. The speakers were incredibly knowledgeable and truly engaging.



Timely topics from industry professionals sharing their passion for digital marketing. A great opportunity for networking and learning real-world solutions.



I was very happy with the event. The quality of the speakers was excellent and the networking opportunities were fantastic.



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



A great platform for bringing industry connections together to share knowledge and practical insights.



A great event with valuable content and a variety of presentations that kept the audience engaged. It sparked new ideas for the year ahead.



Valuable, impactful insights that address today's challenges while looking ahead to the future.



Agenda at a Glance

Eastern Std. Time	DAY 1 - Wednesday, June 10, 2026
7:45 AM	Registration & Networking Breakfast: Build Community Contacts
8:45 AM	Opening Remarks from The Chairperson
9:00 AM	Casestudy: The AI-Native Marketing Organization
9:30 AM	Panel Discussion: Transforming Marketing into a Proven Growth Engine
10:15 AM	Speed Networking! Make Meaningful Connections
10:30 AM	Industry Expert Presentation: Industry Expert Presentation: Drive Growth, Attract New Clients
11:00 AM	Refreshments Break & Exhibitor Lounge
11:30 AM	Industry Expert Presentation: Will Your Bank Be Cited When Customers Ask Ai? / Seeing What You Can't
12:00 PM	Fireside Chat: Scaling Personalization to Drive High-impact Marketing Across Channels / Case Study: The New Age of Creative Storytelling
12:30 PM	Panel Discussion: New Rules Of Brand Discovery / Brand Building in a Distrustful Era
1:15 PM	Networking Lunch & Exhibitor Lounge Visit
2:15 AM	Industry Expert Presentation: Decoding Ai Search/Move Faster in a Regulated World
2:45 PM	Workshops: Lay Off The Pitch/ The Money Mind: Psychographic Personas For Modern Financial Marketing
3:30 PM	Refreshments Break & Exhibitor Lounge: Visit Booths & Source Expertise
3:55 PM	Evaluations
4:00 PM	Presentation: Personalization, Meet Brand
4:30 PM	Industry Expert Presentation: From Data to Decisions to Outcomes Measurement
5:00 PM	Case Study: Grassroots Marketing
5:30 PM	End Of Day One Summary & Closing Remarks
5:35 PM	Evening Reception: Enjoy Great Conversation, Music, & Networking
6:30 PM	Conference Adjourns to Day 2

Eastern Std. Time	DAY 2 - Thursday, June 11, 2026
8:00 AM	Day Two Registration & Networking Breakfast: Build Community Contacts
8:50 AM	Opening Remarks from The Chairperson
9:00 AM	Case Study
9:30 AM	Panel Discussion: Elevate Marketing to The Strategic Core of The Business
10:00 AM	Presentation: The First (And Next) Decade Of Robo Advisors
10:45 AM	Refreshments Break & Exhibitor Lounge: Visit Booths & Source Expertise
11:15 AM	Panel Discussion: Emotional Storytelling Meets Tech-Driven Efficiency
12:00 PM	Roundtable Discussions
12:45 PM	Industry Expert Discussion: Build The Journey Live: You're The Cmo Now
1:15 PM	Networking Lunch & Exhibitor Lounge: Delve Into Industry Conversations
2:15 PM	Fireside Chat: Marketing at The Speed of Change
2:45 PM	Panel Discussion: Navigating Growth & Innovation In A Mature Financial Market
3:15 PM	Exhibitor Lounge Visits & Prize Draw Winner Announcement
3:45 PM	Panel Discussion: Winning The Next Generation
4:30 PM	Presentation: Maximizing Marketing Impact with Limited Budgets
5:00 PM	Closing Remarks & End of Summit
5:15 PM	Conference Concludes

Featured Speakers

[View All Speakers →](#)

Hear directly from senior marketing and growth leaders shaping digital strategy across banking, insurance, credit unions, wealth, and fintech with practical perspectives you can apply immediately.



Selina Wang

VP, Marketing Programs,
Payments 



Martha Turner Osborne

Chief Sales and
Marketing Officer 



Kate Brown

Chief Marketing Officer 



Jeffrey Beck

Chief Marketing Officer 



Chris Hewitt

Chief Marketing Officer 



Brittany Wilson

Chief Marketing Officer 



Kerry Ould

Chief Marketing &
Communications Officer 



Caley Adair

Chief Marketing Officer 



Russel Voutour

Chief Digital,
Technology and
Marketing Officer 



Leanne Nullmeyer

Chief Digital and
Marketing Officer 



Iris Oberlaender

Former Director, Global
Digital Marketing Strategy &
Experience Enablement 



Anthony V. Lambie

AVP, Marketing
Technology, North
America 

Featured Speakers

[View All Speakers →](#)



Taylor Stavenjord

AVP, Brand Impact & Creative Services  Equitable Bank



Michael Letsche

VP, Marketing  TD Wealth Management



Brent Merriman

VP, Marketing & Strategic Insights  CIBC MELLON



Phillip DeSouza

VP, Communications & Marketing  HIROC



Emily Utting

AVP, Marketing & Corporate Comms  ATRIUM



Joe Pellegrino

Director, Digital Marketing  Manulife



Baaba Hughes

Social Media Director  ADELAIDECAPITAL



Carolina Medrano

Director, Marketing  GET A BETTER MORTGAGE



Aparna Allam

Head of Marketing  espresso



Phillip Notley

Head of Marketing & Communications  FCT



Isabel Tremblay

Head of Marketing, Canada  RBC Wealth Management



Dina Beaucage

VP, Marketing & Brand Experience  Cambrian CREDIT UNION

7:45–8:45 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.

8:45–9:00 AM

Opening Remarks From The Chairperson

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



Pat Bolland
Head of Advisor Partnerships
Justwealth

9:00–9:30 AM

Case Study: The AI-Native Marketing Organization

How AI Is Reshaping Brand Activation, Discovery, and Go-to-Market

- How AI agents are becoming a viable extension of the workforce and changing how marketing work gets executed
- How AI-native workflows are compressing timelines for brand, campaign, and application development from months to days — and why large enterprises are increasingly borrowing startup and fintech execution models
- Where leading organizations are applying AI across marketing and customer engagement to improve customer experience, speed to market, revenue growth, and operational efficiency



Lori Bieda
Former Chief Data & Analytics Officer
BMO North American Personal and Business Bank

9:30–10:00 AM

Panel Discussion: Transforming Marketing into a Proven Growth Engine

Shifting Perceptions to Prove Value and Accelerate Revenue

- 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.

Detailed Agenda



Joe Pellegrino
Director, Digital Marketing
Manulife



Brittany Wilson
Chief Marketing Officer
Haventree Bank



Russel Voutour
Chief Digital, Technology and Marketing Officer
YNCU
Moderator

10:15–10:30 AM

Speed Networking! → Make Meaningful Connections

Grow your network by meeting like-minded individuals to share your latest ideas and projects with:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a **fun and agile fashion**.
- **Join a community** of marketing leaders and gain invaluable support.

10:30–11:00 AM

Industry Expert Presentation: Drive Growth, Attract New Clients (Including Gen Z!) And Maximize Retention by an Increased Focus On Personalized Financial Literacy

In our fast-changing digital environment, it’s a necessity to provide thorough financial education to potential and current customers to win and keep their business, especially in the case of Gen Z.

- Provide a fully personalized experience for each client
- Increase organic traffic
- Demonstrate a commitment to financial literacy
- Use AEM to further customize the experience .



Shannon Sloan
Director
Rich Media

11:00 -11:30 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.

11:30–12:00 AM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT



Lori Bieda
Former Chief Data & Analytics Officer
BMO North American Personal and Business Bank

INDUSTRY EXPERT PRESENTATION: WILL YOUR BANK BE CITED WHEN CUSTOMERS ASK AI?

- Understand how AI-powered search generates answers!
- Learn what signals determine whether a brand’s content gets surfaced and cited in AI responses.
- Discover how topical authority and brand trust influence AI visibility for financial brands.
- Walk away with practical content strategies tailored for banks and financial institutions.



Wayne Cichanski
VP of Search & Site Experience
iQuanti

12:00–12:30 PM

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

Building Insight-Led, Privacy-Forward Personalization Strategies

- 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.



Anthony V. Lambie
AVP Marketing Technology, North America
TD



Kevin Press
Editorial Director
Investment Executive

TRACK B: CONTENT, BRAND, & MEDIA



Pat Bolland
Head of Advisor Partnerships
Justwealth

INDUSTRY EXPERT PRESENTATION: THE CONTENT BLIND SPOT

Using Outsight to Map the Narratives Winning the Self-Investorh

- Bring creative capabilities in-house to enhance brand alignment, efficiency, and innovation.
- Leverage human-centered 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.



Charlie Grinnell
Co-CEO
Right Metric

CASE STUDY: THE NEW AGE OF CREATIVE STORYTELLING

Driving Brand Connection with Authentic Content in a Crowded Media Landscape

- 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.



Taylor Stavenjord
AVP, Brand Impact & Creative Services
Equitable

12:30–1:15 PM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

PANEL DISCUSSION: NEW RULES OF BRAND DISCOVERY

Winning Visibility Across AI Search, Social, and Omnichannel Journeys

- 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.



Baaba Hughes
Social Media Director
Adelaide Capital



Martha Turner Osborne
Chief Sales and Marketing Officer
HUB International



Dina Beaucage
VP, Marketing & Brand Experience
Cambrian



Lori Bieda
Former Chief Data & Analytics Officer
BMO North American Personal and Business Bank

Moderator

1:15–2:15 PM

Networking Lunch & Exhibitor Lounge

- 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.

TRACK B: CONTENT, BRAND, & MEDIA

PANEL DISCUSSION: BRAND BUILDING IN A DISTRUSTFUL ERA

Designing a Financial Brand People Believe In

- 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.



Carolina Medrano
Director, Marketing
Get a Better Mortgage Inc.



Kerry Ould
Chief Marketing & Communications Officer
PenFinancial Credit Union



Max Farley
Head of Marketing
JustWealth



Isabel Tremblay
Head of Marketing, Canada
RBC Wealth Management

Moderator

2:15–2:45 AM

TRACK A: MARKETING OPERATIONS & DIGITAL ENABLEMENT

INDUSTRY EXPERT PRESENTATION:
DECODING AI SEARCH

How LLMs See, Cite and Retrieve A Financial Services Brand

- What makes a financial brand retrievable and citable in AI systems
- How to design content that gets included in answers, not just ranked
- Where to build authority beyond your website to influence AI outcomes



Kishan Panpalia
Founding Team, Resident
GEO Expert
Pepper

TRACK B: CONTENT, BRAND, & MEDIA

INDUSTRY EXPERT PRESENTATION:
MOVE FASTER IN A REGULATED WORLD

How financial services leaders are using AI agents to modernize, scale, and convert



Krista North
Regulated Industries
Optimizely



Jen Oliver
Regulated Industries
Optimizely



Chris Vafiadis
Senior Director,
Solution Architecture
Optimizely

2:45–3:30 PM

Workshops (45 mins)

Please select one

WORKSHOP 1: LAY OFF THE PITCH

Strengthening Market Presence, Client Engagement, and Thought Leadership

- Effective media relations is not about pitching stories. The firms that consistently earn coverage are the ones that become trusted sources of insight.
- Using real-world examples from Canadian financial services, Kevin Press shares seven practical media relations best practices for firms seeking stronger relationships with both consumer and trade media. The presentation explores why thought leadership must be built on genuine expertise rather than marketing, how to tailor messages for B2C and B2B audiences, why data and evidence outperform corporate messaging and how compliance can support faster, smarter communications.
- Participants will also learn why expert spokespeople often outperform executives, how to connect outreach to real news hooks and how media trust compounds over time.



Kevin Press
Editorial Director
Investment Executive

WORKSHOP 2: THE MONEY MIND: PSYCHOGRAPHIC PERSONAS FOR MODERN FINANCIAL MARKETING

Leveraging Personality, Worldviews, and Behavior to Build Smarter Client and Investor Personas

- Move beyond demographic and AUM segmentation to personas built on how clients and investors think and behave.
- Understand how personalities, worldviews, and money narratives drive trust and purchasing decisions across different client segments.
- Translate psychographic insight into targeted campaigns, content strategy, and messaging that resonates regardless of the financial product or audience.



Angelica Montagano
Head of Brand Experience
PWL Capital

3:30–3:55 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.

3:55–4:00 PM

Evaluations

4:00–4:30 PM

Presentation: Personalization, Meet Brand

Building Insight-Led Marketing Strategies

- Understand what your customers need from you
- Leverage differentiation that aligns to your Mission & Vision
- A tale of two brands and how strategic choices drive the experience
- Creating personalization through product



Dina Beaucage
VP, Marketing and Brand
Expereince
Cambrian Credit Union

4:30–5:30 PM

Industry Expert Presentation: From Data to Decisions to Outcomes Measurement

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

- Analytics and Customer Insights
- Audience targeting and segmentation
- Cross-Platform Ad Targeting
- Measurement and Attribution
- Marketing Automation and Personalization (AI)



Larry Filler
Senior Vice President,
Practice Leader
Environics

5:00–5:30 PM

Case Study: Grassroots Marketing

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

- 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.



Jeffrey Beck
Chief Marketing Officer
CST Savings

5:30–5:35 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!

5:35–6:30 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 Toronto nightlife has to offer. Just be sure to set your alarm for Day 2!

6:30 PM

Conference Adjourns to Day 2



8:00–8:50 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.

8:50–9:00 AM

Opening Remarks from The Chairperson

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

9:00–9:30 AM

Case Study

- Understand what AI capabilities drive the greatest impact to prioritize integrating key technologies
- Transforming from technology accumulation to ecosystem orchestration
- Reorganizing teams around outcomes rather than tools



Chris Hewitt
Chief Marketing Officer
Sunlife

9:30–10:00 AM

Panel Discussion: Elevate Marketing To The Strategic Core Of The Business

Shape Enterprise Decisions, Growth, and Customer Outcomes

- 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.



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



Moderator

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

10:00–10:45 AM

Presentation: The First (And Next) Decade Of Robo Advisors

- Learn what a Robo Advisor is (and why that misnomer won’t go away)
- Understand how and why this segment of the financial market in Canada continues to grow
- Examine how larger financial institutions are reacting to the relentless Robo growth



James Gauthier
Chief Investment Officer
Justwealth



Andrew Kirkland
President
Justwealth

10:45 -11:15 AM

Refreshments Break & Exhibitor Lounge: Visit Booths & Win Prizes

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

11:15–12:00 PM

Panel Discussion: Emotional Storytelling Meets Tech-Driven Efficiency

Merging Empathy and Innovation to Win Hearts and Minds

- 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.



Kate Brown
Chief Marketing Officer
Insurely



Michael Letsche
VP, Marketing
TD Wealth



Jeffrey Beck
Chief Marketing Officer
CST Savings



Moderator

Phillip Notley
Head of Marketing & Communications
FCT

Detailed Agenda

12:00–12:30 PM

Roundtable Discussions (45 Mins)

Please select one



Kevin Press
Editorial Director
Investment Executive

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



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

C: BRAND AS A GROWTH ENGINE: Elevating Your Strategy to Attract New Audiences, Impact Revenue, and Own the Growth Pipeline



Angelica Montagano
Head of Brand Experience
PWL Capital

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



Kate Brown
Chief Marketing Officer
Insurely

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



Stella Ladizhinsky
Former Managing Director,
Brand & Marketing
Questrade

- F: AFFILIATE & PARTNER MARKETING:** Leveraging Relationships to Differentiate Your Brand and Grow Your Customer Base
- G: FROM PERSONALIZATION TO PREDICTION:** Using Data, AI, and Behavioural Insights to Anticipate Customer Needs
- H: THE MODERN FINANCIAL SERVICES CUSTOMER JOURNEY:** Navigating Expectations Across Digital and Human Channels
- I: MARKETING IN A REGULATED WORLD:** Staying Creative While Managing Compliance and Risk
- J: PERFORMANCE MARKETING REIMAGINED:** Balancing Short-Term Results with Long-Term Brand Value
- K: REBUILDING RELEVANCE FOR YOUNGER AUDIENCES:** Engaging the Next Generation of Financial Consumers
- L: THE EXECUTIVE BUY-IN PLAYBOOK:** Securing Support & Budget for Marketing Initiatives
- M: THE NEW ERA OF SEARCH:** Preparing Your Brand for AI Discovery and Conversational Search
- N: THE POWER OF NICHE MARKETING:** Winning Specific Audiences Through Specialized Messaging and Experiences
- O: MARKETING THROUGH UNCERTAINTY:** Navigating Economic Pressure, Consumer Anxiety, and Market Volatility

12:45–1:15 PM

Industry Expert Discussion: Build The Journey Live: You’re The Cmo Now

An Exploration of Growth, Trust, Compliance & AI in Financial Services

- Why fragmented customer journeys are limiting marketing performance
- Where AI and personalization efforts struggle to scale
- How leading institutions are balancing growth, trust, and compliance
- What it takes to create more intelligent, connected customer experiences



Mona Champaneri
SVP, Head of Financial
Service & Insurance
Valtech



Richard Harris
VP, Data & AI
Valtech

1:15–2:15 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 **digital marketing colleagues**.

2:15–2:45 PM

Fireside Chat: Marketing At The Speed of Change

Driving Agility in Financial Services

- 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. .



Pat Bolland
Head of Marketing
JustWealth

Moderator



Caley Adair
Chief Marketing Officer
Embark

2:45–3:15 PM

Panel Discussion: Navigating Growth & Innovation in a Mature Financial Market

Redefining the Future of Banking in a Concentrated Market

- 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.



Selina Wang
Vice President, Marketing Programs, Payments
JPMorgan Chase



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



Leanne Nullmeyer
Chief Digital and Marketing Officer
Kindred Credit Union



Max Farley
Head of Marketing
Justwealth

3:15–3:45 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.

3:45–4:30 PM

Panel Discussion: Winning The Next Generation

How Gen Z & Emerging Talent Are Reshaping Financial Services Marketing

- Explore how content formats, platforms, and creator culture are shaping brand engagement and GenZ buying behaviours. (e.g. Does the media / social media environment match the buying behaviour?)
- Hiring in the age of “GenAI” – outlook on the impact of LLMs on hiring and training early career talent.
- Build a short action plan to future-proof marketing strategy and team culture



Brent Merriman
Vice President, Marketing & Strategic Insights
CIBC Mellon



Bryanna Carter
Incoming AML Summer Student
Onion Lake Cree Nation



Sofia Malatesta
Customer Experience and Acquisition Intern
McMaster University



Paris Holmes
Product Marketing Intern
Mackenzie Investments

4:30–5:00 PM

Presentation: Maximizing Marketing Impact with Limited Budgets

Driving Results Through Smart Targeting, Personalization, and Analytics

- 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.



Sarah Madden
Growth Marketing & Communication Lead
BOXX Insurance

5:00–5:15 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

5:15 PM

Conference Concludes

Stay at the Hyatt Regency Toronto

Downtown Toronto at Your Door

Location, street address, proximity to financial district and landmarks (CN Tower, Rogers Centre, Princess of Wales), Union Station/TTC access, and surrounding dining scene.

Built for Conversation

Leans into the onsite social programming for attendees and speakers, the connected layout for between-session networking, and the event-as-a-whole framing rather than generic “meeting rooms” language.

Comfortable, Self-Contained Stay

Covers rooms/city views, complimentary Wi-Fi, King Street Social Kitchen (all three meal periods), rooftop pool access, and closes with the booking note (direct contact, no room block).

Strategy Institute does not have a room block with the venue hotel. Please contact the hotel directly for rates.

Hyatt Regency Toronto
370 King Street West, Toronto ON M5V 1J9
(416) 343-1234

IMPORTANT: Strategy Institute is not affiliated with, nor do we contract any third-party room booking service. Please contact the hotel directly to make your reservations.

***subject to availability



Register for DMFS Canada 2026

Choose your pass type: in-person or virtual access

Secure your spot at DMFS Canada (June 10 - 11, 2026). Select **Full In-Person Access** for the complete onsite experience, or **Live Stream Access** to join key sessions from anywhere - both include **3-month on-demand replays**.

What’s included in your registration

Full In-Person Access includes:	Live Stream Access includes:
• Full conference access (keynotes, panels, case studies, roundtables) • In-person networking with speakers, delegates, and sponsors • Breakfast, lunch, snacks + onsite cocktail reception • Expo Hall access • Speaker content (presentations/white papers where available) • On-demand access for 3 months	• Keynotes, panels, and live Q&A via stream • Virtual networking (message boards, roundtables, private chats) • Virtual Expo Hall access • Speaker content (presentations/white papers where available) • On-demand access for 3 months

Pass Type	Rate
Full In-Person Access	\$1,695
Live Stream Access	\$1,395
Group Rates (in-person)	\$1,695 (1 - 2) / \$1,595 (3-4) / \$1,395 (5+)

Ready to register?

Register Now →

Contact:

Sam Caskey, Delegate Registration Manager
Email: sam.caskey@strategyinstitute.com