



THE LEADING EVENT IN THE UNITED STATES FOR FINANCIAL MARKETING LEADERS

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Digital Marketing *for*
Financial Services
Summit **CHARLOTTE**

MAY 7-8, 2026 | OMNI CHARLOTTE HOTEL | CHARLOTTE, NC

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CONTENTS

01. MESSAGE FROM THE PRODUCER

02. INTRO: SHAPING MARKETING'S FUTURE

03. WHY ATTEND?

04. NETWORK AND HAVE FUN

05. AGENDA SUMMARY

06. WHO ATTENDS?

07. TESTIMONIALS

08. SPEAKER LINEUP

09. FULL AGENDA

10. HOW TO REGISTER

MESSAGE FROM THE PRODUCER

Dear Colleagues,

Welcome to the Digital Marketing for Financial Services Charlotte Summit, which brings together the most **innovative, engaged, and influential marketing leaders driving strategic outcomes.**

The summit 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.

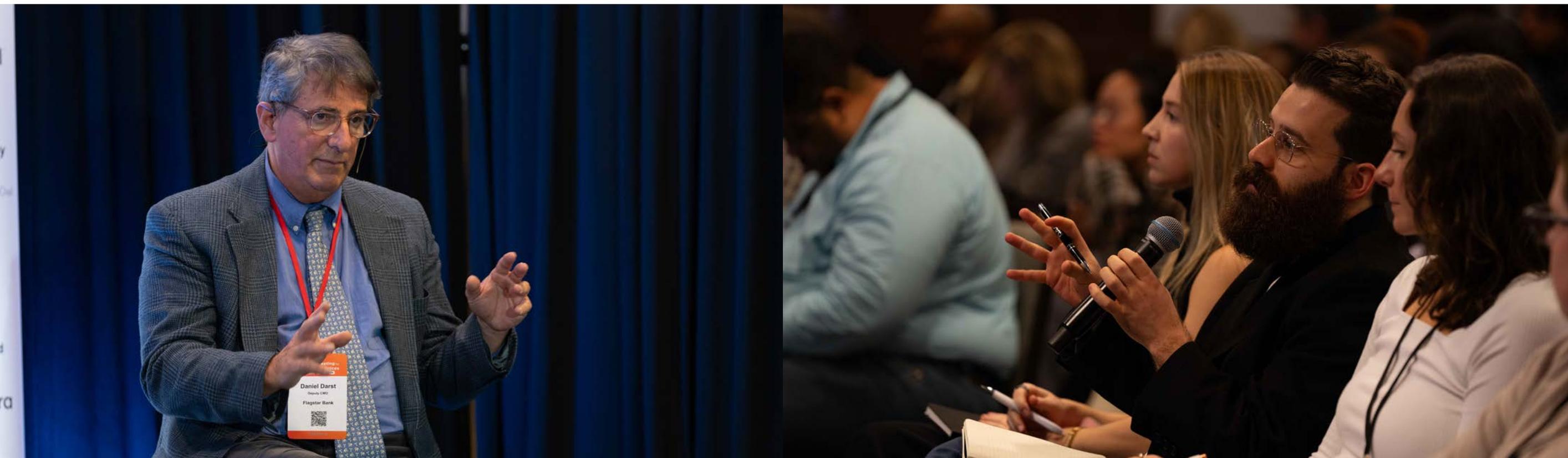
We have curated a two-day agenda packed with case studies, workshops, panel discussions, and roundtables. Two dedicated tracks will provide you with an actionable plan on how to **accelerate your go-to-market strategy, harness the power of AI to supercharge your personalization, streamline your MarTech 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 **Bank of America, Truist, Wells Fargo, Aspida, TIAA, AgFirst Farm Credit Bank, First Citizens Bank, ALLCHOICE Insurance, The Callaway Black Group, and Brighthouse Financial.** We look forward to welcoming you into the DMFS Charlotte community and hosting you this May!



Rebecca Mayoh-Davis
Senior Conference Producer
Strategy Institute
rebecca@strategyinstitute.com





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

The Digital Marketing for Financial Services Charlotte Summit is the newest addition to our DMFS portfolio, bringing together top industry leaders, innovators, and experts to explore the future of digital marketing. 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. You can expect to...

- ▶ Step into the future at the inaugural DMFS Charlotte Summit. Over two days, dive into cutting-edge topics focusing on **securing brand trust, ensuring compliant targeting, and harnessing the power of automation.**
- ▶ Connect with experts from **Bank of America, Wells Fargo, Truist, and Aspida across two incredible tracks:** Brand & Customer Authenticity and Streamlining with Technology. From workshops to case studies, you will master campaign optimization, strengthen your brand trust, and harness AI for advanced personalization.
- ▶ Join visionaries prioritizing "homegrown" marketing — and **unlock what's next for your organization.**

WHY ATTEND?

Discover countless reasons to be part of this exceptional event! At the DMFS Charlotte Summit, we're dedicated to crafting a personalized experience that guarantees an outstanding two days, delivering maximum ROI for you and your organization. Here's why you won't want to miss joining us in 2026.



STRATEGIC INSIGHTS

Gain practical strategies to strengthen digital marketing performance, improve customer engagement, and generate measurable growth across financial services, including approaches for personalization, content, and brand differentiation.



INTERACTIVE WORKSHOPS

Take part in hands-on sessions that help refine campaign structure, improve personalization workflows, and translate customer data into clear and actionable marketing decisions that drive better results.



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 financial institutions enhance omnichannel journeys, advance marketing automation, and apply AI and analytics to deliver scalable and effective digital experiences for diverse customer segments.



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 SUMMARY

From expert-led sessions and thought-provoking keynote speakers to interactive workshops and networking opportunities, every moment at DMFS Charlotte 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 powered 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 **three-prong approach to AI implementation** for optimal operational impact
- **Unite brand consistency and marketing innovation** to support growth and client conversion
- Develop a content strategy that **connects with the audience and aligns with organizational goals**

WORLD-CLASS CONTENT

- Build scalable, future-proof **growth pipelines**
- Implement **optimized marketing campaigns** across products
- **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 attendees from some of the biggest brands across the digital marketing landscape. This is your opportunity to join them and be a part of the incredible story of DMFS Charlotte 2026.



BlackRock



J.P.Morgan



Bloomberg

JPMORGAN CHASE & CO.

Hines



TESTIMONIALS

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



"I thoroughly enjoyed this event. The subjects were well thought out, and the speakers were great. It wasn't too bank-heavy."

Direxion
ETFs | Funds



"This was a great event... It's great to hear how industry leaders are working to solve complex problems."

 **Northwestern Mutual**



"An incredible opportunity to network with marketing industry experts... learned so much about how to leverage AI for content."

 **SHELTERPOINT**



"The sessions were relevant, interesting and engaging. I liked the breakout sessions and thought the speakers were well rounded."

 **CAMBRIDGE ASSOCIATES**



"Very relevant guest speakers, topics and vendors for CMOs today."

Apple Bank 



"DMFS was very educational and thought-provoking. Having a space for my direct vertical is game changing."

 **FRANKLIN TEMPLETON**

SPEAKER LINE UP

[MANY MORE](#) ↗

Our agenda is delivered by the best financial marketing experts across the 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.



Elizabeth Avery

Vice President,
Marketing Services Team

Wells Fargo



Shannon Perrin

VP, Consumer Lending
Marketing

Wells Fargo



Harish Naik

Head of Marketing Tech
& Innovation Labs

Ally Bank



Nina Freeman

VP, Digital Marketing
Manager

Truist



Bradley Erickson

SVP, Director, Digital
Marketing

First Citizens Bank



Jacob Holtgrewe

Global Head of Digital
Marketing & Media

TIAA



Katy Dugal Simpson

Chief Marketing Officer

The Callaway Black
Group, Northwestern
Mutual



Juan Silvera

Chief Marketing Officer

AgFirst Farm Credit
Bank



Steve Donohue

Senior VP of Marketing,
Institution Services

LPL Financial



**Denise Milano
Sprung**

Chief Marketing Officer

Mitlin Financial

SPEAKER LINE UP

[MANY MORE](#) ↗

Our agenda is delivered by the best financial marketing experts across the 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.



Bonnie Habyan
Chief Marketing Officer
X-Caliber Capital



Marco Carrucci
Vice President,
Marketing
TradeStation



Brian Clark-Kahl
Vice President,
Marketing &
Communications
Aspida



Stephen Rohrer
Head of Marketing
Data & AI
Equitable



Maggie Lukas
Head of Digital Bank
Marketing
Forbright Bank



Amy Holt
Senior Vice President,
Marketing
SECU



Jared Bellmund
Director, Marketing &
Sales
ALLCHOICE Insurance

7:30 AM REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **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: MARKETS IN MOTION

Safeguarding Performance and Driving Growth Amid Uncertainty

Gain proven tactics from financial marketing leaders who reallocate budgets, refine messaging, and protect revenue pipelines when economic and geopolitical conditions shift. Source practical tips to:

- Use agile planning frameworks to adjust channel mix and budgets in real time without sacrificing ROI.
- Leverage data signals to anticipate customer sentiment shifts and make timely updates to offers and creative.
- Apply risk mitigation strategies that maintain brand trust while capitalizing on emerging market opportunities..

Advance your team's ability to remain resilient, responsive, and growth-focused, regardless of market turbulence.

9:30 AM INDUSTRY EXPERT: AI-POWERED ANALYTICS

Elevate Your Campaign Performance and Personalization with Advanced Analytics

Harness AI capabilities to drive more impactful marketing campaigns and deliver truly personalized experiences. Streamline your campaign execution with AI-powered analytics. Walk away with an action plan on:

- Leveraging advanced analytics to optimize audience targeting and boost campaign performance.
- Automating repetitive tasks and nurturing leads with personalized, real-time content and offers.
- Integrating AI into your existing marketing stack while maintaining transparency and trust.

Optimize your marketing efficiency to strengthen your competitive edge and elevate your customer experience.

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, supported by AI-enabled automation to deliver on brand promises. Take away specific solutions to:

- Balance high-impact brand campaigns that evoke aspiration 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.

10:45 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.

11:00 AM REFRESHMENTS BREAK & EXHIBITOR LOUNGE VISITS

- Explore the latest **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.

11:30 AM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

INDUSTRY EXPERT: HYPER-PERSONALIZATION AT SCALE

AI-Powered Campaigns that Anticipate Needs and Boost Conversion

Leverage AI to deliver hyper-personalized campaigns that drive conversions and deepen loyalty. Create a roadmap to:

- Leverage predictive analytics to tailor messages and offers at the individual level.
- Automate dynamic campaign adjustments based on real-time customer signals.
- Measure lift from personalized outreach to optimize media spend and ROI.

Transform your marketing with AI-powered personalization to deepen engagement and maximize conversion rates.

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

INDUSTRY EXPERT: TECHNOLOGY-ENABLED CHANGE MANAGEMENT

Building a Business Case and Momentum to Drive Change within Your Organization

Build a compelling business case and foster the momentum necessary for successful change management. Take away specific solutions to:

- Empower your organization to become comfortable with innovation and identify how to prioritize transformation projects.
- Engage key stakeholders and secure buy-in for your vision.
- Approach changes and risk-taking from a leadership perspective.

Amplify your ability to drive change and innovation to ensure your business remains dynamic and adaptable.

12:00 PM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

CASE STUDY: MARKETING TO THE NEXT GENERATION

Shifting Strategies to Engage Younger Generations

Revamp your content, channels, and messaging to win the loyalty of Gen Z and younger millennials without alienating legacy audiences. Take back to your office strategies to:

- Implement platform-native tactics like short-form video, creators, and interactive tools that drive authentic engagement on TikTok, Instagram Reels, and emerging channels.
- Develop values-driven storytelling frameworks that align financial products with younger consumers' priorities: transparency, social impact, and financial empowerment.
- Establish measurement and feedback loops that translate real-time social signals into rapid creative iterations and product enhancements.

Perfect a next-gen playbook that future-proofs your brand and captures the attention of tomorrow's most valuable customers.

Juan Silvera, Chief Marketing Officer, **AgFirst Farm Credit Bank**

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

CASE STUDY: STAYING AHEAD OF THE GAME IN MARTECH

Enhancing MarTech Integration with Legacy Systems

Take the headache out of implementing new technologies into your existing frameworks for a streamlined integration journey. Master the success factors to:

- Apply best practices for integration with legacy systems for seamless technology implementation.
- Use methods to break down silos between systems to create a clearer customer picture and ensure targeted marketing.
- Gain actionable insights on creating clear communication pathways while integrating new technologies.

Improve your MarTech implementation to evolve your marketing strategies and ensure clear and targeted advertising.

Marco Carrucci, Vice President, Marketing, **TradeStation**

12:45 PM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

PANEL DISCUSSION: GRASSROOTS MARKETING

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

Engage the local community to drive engagement beyond digital platforms. Source your plan of action by:

- Establishing campaigns that connect with the community and build organic relationships that convert into new clients.
- Creating a story that involves the consumer in a journey, creating increased 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 attracts the loyalty of its consumers.

Amy Holt, Senior Vice President, Marketing, **SECU**

Bradley Erickson, SVP, Director, Digital Marketing, **First Citizens Bank**

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

PANEL DISCUSSION: ACCELERATING GROWTH WITH AI-ENABLED INSIGHTS

Practical Keys for Using Data and AI to Strengthen Your Go-to-Market Strategy

Unlock practical tips to accelerate growth by infusing and embedding analytics into your go-to-market strategy. Discover best practices for utilizing AI-enabled insights and intelligence. Develop a blueprint to:

- Manage and improve customer awareness, consideration, preference, and consumption.
- Drive product innovation and adapt faster to changing customer preferences, needs, and use cases.
- Take the time, cost, and complexity out of targeting and personalizing your go-to-market programs on an account, persona, and individual level at scale.

Bolster your go-to-market effectiveness and increase consumer loyalty by harnessing data and AI to drive innovation.

1:15 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 **marketing colleagues**.

2:15 PM

INDUSTRY EXPERT: SEARCH REIMAGINED

Navigating AI-Native Query Experiences and Intent Signals

Stay ahead of the AI-powered search revolution by mastering strategies that align your content with conversational queries and context-driven intent. Achieve a step-by-step action plan to:

- Optimize content for AI-driven platforms and voice assistants to ensure your brand is the top recommendation.
- Structure web and mobile experiences to capture emerging intent signals from chatbots, generative engines, and virtual assistants.
- Integrate conversational search tactics into your SEO and SEM mix to boost discoverability across text, voice, and hybrid interfaces.

Advance your search strategy and secure visibility in the AI-first era of customer discovery to engage users with personalized experiences.

2:45 PM

WORKSHOP (30 mins)

Work through practical hands-on exercises that will strengthen your role as a marketing leader within your organization.

WORKSHOP A: AI-DRIVEN TEAM BLUEPRINT

Mapping Automation, Augmentation, and New Roles for Maximum Impact

Design a future-ready marketing organization by separating tasks into three clear buckets around automation, augmentation, and elevation. Take away specific solutions to:

- Apply the “Three-Phase Framework” to pinpoint what can be fully automated, which activities AI should augment, and where human ingenuity remains irreplaceable.
- Define workforce shifts by redeploying staff toward high-value, revenue-generating functions and tracking revenue, NPS, and asset-level performance to prove impact.
- Identify and develop new roles while resetting leadership expectations around coaching and continuous upskilling.

Amplify your ability to streamline operations, enhance human potential, and future-proof your marketing team in an AI-driven landscape.

OR

WORKSHOP B: FINANCIAL ADVISOR MARKETING

Driving Brand Consistency and Sales Impact Through Strategic Enablement

Provide advisors with the support, training, and technology they need to attract new clients, deepen existing relationships, and differentiate themselves in a crowded market. Source your plan of action by:

- Equipping advisors with branded content, digital platforms, and compliant marketing resources to elevate their outreach.
- Implementing data-driven personalization to help advisors deliver tailored solutions and strengthen client relationships.
- Building a culture of continuous learning and collaboration, where advisors seamlessly integrate marketing insights into their sales efforts.

Transform your advisor network into a powerful growth engine by uniting brand consistency, marketing innovation, and sales enablement.

Brian Clark-Kahl, Vice President, Marketing & Communications, **Aspida**

OR

WORKSHOP C: INFLUENCER-FIRST CONTENT STRATEGY

Integrating Diverse Human-Centric Content Formats to Set Your Brand Apart in the Financial Sector

Financial brands are breaking away from traditional marketing by integrating diverse, human-centric content formats. Transform your approach to content creation to position your brand as a leader in the financial sector. 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.

Heighten your brand's impact by showcasing the strategic implementation of influencer-first approaches and creative storytelling across platforms.

3:30 PM 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.

4:00 PM KEYNOTE PRESENTATION: THE POWER OF LEADING WITH JOY

Human-centered marketing that builds connections and drives organic growth

Harness the impact of emotionally intelligent, human-centered marketing to build deep connections and unlock sustainable organic growth. Adopt best practices to:

- Embed positive storytelling into campaigns to elevate authenticity and strengthen brand affinity.
- Use audience insight and behavioral cues to uncover what motivates engagement and drives meaningful action.
- Align stakeholders around a shared purpose to create cohesive, relationship-focused marketing experiences.

Transform client touches into a connection-first growth engine that expands reach, increases loyalty, and positions your brand for long-term success.

Denise Milano Sprung, Chief Marketing Officer, **Mitlin Financial, Inc**

4:30 PM CASE STUDY: AI-AGENTS FOR GROWTH

Automating Campaign Planning, Budget Allocation, and ROI Optimization

Harness the power of AI agents to manage complex marketing tasks, freeing your team to focus on strategy and creativity. Create a roadmap to:

- Identify marketing workflows that deliver the highest ROI when automated.
- Deploy AI-driven agents to plan campaigns, allocate budgets, and continuously optimize performance based on real-time data.
- Establish governance and human-in-the-loop processes to ensure AI decisions align with brand guidelines, compliance, and business objectives.

Achieve growth and efficiency by embedding intelligent automation into your marketing operations.

5:00 PM KEYNOTE PRESENTATION: GROWTH AT SCALE

Driving Large-Scale Growth with AI, Automation, and Data-Driven Insights

Leverage advanced technology, sophisticated data analytics, and AI-driven personalization to achieve significant growth. Adopt best practices to:

- Integrate enterprise-scale MarTech stacks and AI to unify campaigns across multiple business units.
- Harness predictive analytics to identify high-potential segments, optimize budgets, and measure ROI.
- Encourage cross-functional collaboration to streamline processes and accelerate go-to-market speed.

Transform large-scale marketing operations into a powerful engine of sustained growth to drive long-term success and market leadership.

Elizabeth Avery, Vice President, Marketing Services Team, **Wells Fargo**

5:30 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!

5:45 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!

FULL AGENDA

DAY 2 - Friday, May 8, 2026

8:00 AM NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **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 PRESENTATION: THE CURRENCY OF CERTAINTY

Designing the Modern Financial Brand at Scale

Unearth a strategic roadmap for CMOs and digital leaders to operationalize their brand standards to amplify customer trust. Master the success factors to:

- Embed brand voice, tone, and compliance standards directly into your MarTech stack and content generation workflows, ensuring consistency and trustworthiness.
- Establish clear strategies to connect your brand promise with hyper-personalized delivery models.
- Implement processes and tools that reduce the average time-to-market for new campaigns from weeks to days, turning compliance overhead into a competitive advantage.

Improve strategic insights on MarTech optimization, data governance, and channel cohesion to create tangible processes that protect and rapidly grow your brand equity.

9:30 AM INDUSTRY EXPERT: AI & BRAND GOVERNANCE

Safeguarding Trust while Deploying Generative Content at Scale

Ensure every AI-driven asset upholds your brand's integrity and compliance standards. Source practical tips to:

- Establish governance frameworks and human-in-the-loop checkpoints to vet AI-generated content for accuracy and brand voice.
- Embed compliance filters and review processes to prevent regulatory missteps in automated campaigns.
- Train AI models on brand guidelines and refine them through continuous feedback to maintain consistency.

Excel at balancing innovation with rigorous governance and oversight to unlock the full potential of AI-powered creativity while safeguarding brand integrity and trust.

10:00 AM PANEL DISCUSSION: THE AI ACCELERATION PARADOX

Turning Compliance Anxiety into a Competitive Edge

Discover a practical roadmap for managing AI compliance to accelerate deployment within budget constraints. Transform AI anxiety into a distinct market advantage and drive tangible results. Walk away with an action plan on:

- Optimizing existing marketing spend with low-investment, high-return AI applications to drive customer acquisition with minimal infrastructure investment.
- Implementing RegTech solutions to achieve streamlined content approval with pre-vetted, compliance-friendly campaigns.
- Apply in-house AI training programs to maximize the efficiency and confidence of your marketing teams.

Transform regulatory fear into a validated, high-performing growth engine that delivers immediate, measurable results.

Shannon Perrin, VP, Consumer Lending Marketing, **Wells Fargo**

Stephen Rohrer, Head of Marketing Data & AI, **Equitable**

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

- Explore the latest **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.

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) WHEN DATA IS SCARCE: Strategies for Communicating Impact without Traditional KPIs
Led by: Steve Donohue, Senior VP of Marketing, Institution Services, LPL Financial

B) AFFILIATE AND PARTNER MARKETING. Leveraging Relationships to Differentiate Your Brand and Grow Your Customer Base

C) THE FUTURE OF WEALTH: Activating Diverse Communities in Preparation for the Great Wealth Transfer

D) SOCIAL MEDIA ROI: Moving Beyond the Awareness Stage to Pipeline Growth

E) GENAI, COMPLIANCE, AND CREATIVITY: Balancing GenAI Innovation with Legal Realities

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

12:00 PM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

CASE STUDY: INTELLIGENT CONTENT ENGINE

Data-Driven Creation and Distribution for Maximum Relevance

Accelerate content ROI by using audience insights and performance data to guide every stage of creation and delivery.

Master the success factors to:

- Analyze customer behavior and search trends to pinpoint high-impact topics and formats.
- Leverage AI-assisted tools to draft, optimize, and adapt content for different channels at scale.
- Automate distribution workflows — email, social, and web — to deliver the right message to the right audience at the right time.

Enrich your content strategy with a data-informed engine that drives measurable engagement and ongoing relevance.

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

CASE STUDY: PAID MEDIA

Maximizing ROI with Algorithmic Bidding and Privacy-First Targeting

Optimize your paid campaigns for cost-efficiency and compliance. Harness AI-driven bidding strategies and first-party data tactics. Take away specific solutions to:

- Leverage algorithmic bidding to adjust budgets and bids in real time for peak performance.
- Implement privacy-first targeting using first-party and contextual signals to reach high-intent audiences.
- Measure and attribute campaign impact accurately in a cookie-less environment.

Improve your paid media strategy to boost ROI while maintaining customer privacy and trust.

12:30 PM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

INDUSTRY EXPERT: CUSTOMER TRUST DIVIDEND

Earning Loyalty through Transparency, Security, and Purpose-Driven Branding

Build deeper customer loyalty and unlock the long-term “trust dividend.” Embed transparency, security, and authentic purpose at the heart of your marketing. Adopt best practices to:

- Communicate pricing, fees, and product details with radical transparency to reduce friction and build credibility.
- Showcase your data security and privacy practices as a competitive advantage that reassures and retains customers.
- Align brand purpose and ESG initiatives with customer values to create emotional connections and inspire advocacy.

Amplify the trust dividend to drive loyalty, referrals, and sustainable growth in competitive markets.

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

INDUSTRY EXPERT: DIGITAL EXPERIENCE ACCELERATION

Transforming Financial Services with Streamlined Technology and Personalization

Drive client acquisition, deepen relationships, and stay competitive in a fast-evolving market. Implement an integrated approach to content management and marketing automation. Develop a blueprint to:

- Align content and CRM systems to create a consistent, intuitive customer journey.
- Rapidly deploy impactful solutions by tapping into expertise with leading platforms in the market.
- Use data and marketing automation to deliver personalized customer experiences that boost engagement and growth.

Achieve a strategic, technology-first approach that optimizes your digital ecosystem, boosts efficiency, and delivers meaningful customer experiences.

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 **big data and analytics colleagues**.

2:00 PM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

**CASE STUDY: CREATIVE RISK-TAKING
IN FINANCIAL MARKETING**

**Reinventing Brand and Media Strategies
to Capture Attention**

Break through the noise in the highly regulated financial arena. Embrace bold, creative strategies that drive engagement and differentiation. Create a roadmap to:

- Identify calculated, creative risks that break through industry noise while staying compliant.
- Design multi-channel campaigns that leverage bold storytelling to drive engagement.
- Collaborate with compliance and legal teams from day one to turn constraints into innovative opportunities.

Imbue your brand with fearless creativity that wins attention and drives results in a regulated landscape.

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

**CASE STUDY: THE MODERN
MARKETING PLAYBOOK**

**Bridging Data, Creativity, and Business
Strategy to Drive Growth**

Generate measurable business impact, align with financial decision-makers, and scale your efforts for maximum ROI. Unlock the core marketing skills and strategic levers needed to create high-value, insight-driven marketing functions. Achieve a step-by-step action plan to:

- Connect marketing strategy with business objectives to secure investment and leadership buy-in.
- Integrate data, creativity, and marketing technology to deliver personalized engagement at scale.
- Align with key stakeholders, including the CMO, CFO, and CIO, to drive strategic marketing initiatives.

Transform marketing into a strategic, revenue-driving force that shapes the future of your business.

Jared Bellmund, Director, Marketing & Sales, **ALLCHOICE Insurance**

2:30 PM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

**INDUSTRY EXPERT: COMPLIANT MEDIA
ORCHESTRATION**

**Optimizing Audience Segmentation,
Planning, and Spend without Regulatory
Risk**

Achieve precise targeting and high ROI while adhering to strict financial regulations and privacy standards. Develop a blueprint to:

- Leverage first-party data, consented partnerships, and contextual signals for precise audience segmentation.
- Structure media plans that balance performance goals with compliance checkpoints and audit trails.
- Implement privacy-safe measurement and attribution approaches that honor regulations while driving insights.

Perfect your media campaigns to maximize marketing effectiveness while respecting regulatory requirements.

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

**INDUSTRY EXPERT: VIDEO CONTENT
IN FINANCE**

**Best Ways to Leverage Video in 2026 to
Boost Customer Engagement**

Integrate proven video strategies and practices into your content approach to maximize engagement, conversion, and the customer experience. Source practical tips to:

- Scale video capabilities through strategic partnerships and video-generating technologies.
- Identify the most impactful metrics and indicators to evaluate success.
- Analyze data to identify patterns, compare performance across channels, and optimize engagement.

Improve data-driven video marketing efforts to better capture attention and educate your customers.

3:00 PM

**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.

3:30 PM | **PANEL DISCUSSION: THE VELOCITY OF CUSTOMER INTELLIGENCE**

Breaking Data Bottlenecks to Achieve 10x Marketing Speed

Discover a pragmatic, executive framework to unify your data infrastructure, eliminate friction points, and unlock the speed needed to outmaneuver competitors in a regulated market. Master the success factors to:

- Create the data foundations essential for maximizing MarTech stack ROI and ensuring models are trained on complete, accurate datasets.
- Automate the data pipeline and create self-service access to quality-assured segments.
- Link improvements in data fidelity directly to measurable business outcomes to prove ROI.

Optimize your technology investments to translate directly into marketing velocity and measurable revenue growth.

4:15 PM | **CASE STUDY: THE SHIFTING ROLE OF MARKETING CHANNELS**

Boosting Awareness, Engaging Customers, and Driving Growth Across Multiple Touchpoints

Shape your marketing strategy and drive measurable impact by exploring the evolving role of digital channels. Take away specific solutions to:

- Embrace new channel opportunities while optimizing legacy platforms for stronger ROI.
- Tailor channel strategies to align with evolving consumer behaviors and preferences in finance.
- Build a cohesive, omnichannel approach that supports brand consistency, personalization, and compliance.

Perfect the right mix of traditional and cutting-edge channels to maximize customer engagement and drive long-term success across all touchpoints.

4:45 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.



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

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

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VIRTUAL ATTANDANCE
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Sam Caskey

Delegate Registration Manager

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Summit **CHARLOTTE**

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