

A man with a beard, wearing a dark suit and a red and blue patterned tie, stands on the left side of the frame, gesturing with his right hand raised. He is addressing a large audience seated at round tables in a dimly lit conference room. The room features a large, ornate chandelier hanging from the ceiling. The audience members are looking towards the speaker. The overall atmosphere is professional and focused.

Digital Marketing for
Financial Services
Summit **CHARLOTTE**

PAST ATTENDEE LIST

THE LEADING EVENT SERIES IN THE UNITED STATES FOR FINANCIAL MARKETERS

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SAMPLE PAST ATTENDEE LIST

2026 PAST ATTENDEE LIST

COMPANY	JOB TITLE
40Seas	VP Marketing and Business Operations
A.M. Best Company	Web and Social Media Strategist Manager
Abacus Global Management	Director of Digital Marketing
aegiscap.com	Vice President, Venture & Growth Equity
ailct.com	Sales Manager
Alera Group, Inc.	Vice President of Digital Marketing
Alliant Credit Union	Head of Performance Growth, Paid & Organic Channels
Alloy Labs Alliance	SVP of Product
Allstate	Insurance Producer
Allstate	Marketing Manager
Allstate	Sales and Marketing Associate
American Express	Director - Digital Product Mgmt
American Express	Director, Global Audience Media Enablement
American Express	Director, Global Audience Media Enablement
American Express	Director, Marketing Analytics
American Express	Senior Manager, Market Strategy & Insights (Acting Director since 2025)
American Express	Sr. Manager, Marketing Analytics
American Express	VP, Digital Marketing Solutions & Delivery, Enterprise Marketing Platforms & Solutions
American Express	VP, Global Digital Acquisition – Consumer & Small Business Funnel Optimization, Sales Enablement
American First Finance LLC	Director, Growth & Lifecycle Marketing
American First Finance LLC	Executive Director, B2B Marketing
American Retirement Association	Digital Marketing Director
Ameritas	Senior Vice President, Chief Marketing Officer
Ameritas	Senior Vice President, Chief Marketing Officer
Andrew Davidson & Co	Social Media Manager
Aon	Manager, Brand Strategy
Apple Bank for Savings	Asst Marketing Analytics & Segmentation Manager
Apple Bank for Savings	AVP, Customer Success and Analytics Manager
Apple Bank for Savings	Digital Marketing Specialist
Apple Bank for Savings	First Vice President, Assistant Marketing Director
Apple Bank for Savings	SVP, Head of Marketing
Apple Bank for Savings	VP
ApplePie Capital	Chief Revenue Officer

SAMPLE PAST ATTENDEE LIST

2026 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Ardan Equity	Investor Relations
AshtonBridge	Marketing Manager
Aspen Standard Wealth	Partner Head of Marketing
Aspida	Vice President, Marketing & Corporate Communications
Assured Guaranty Ltd	Director, Corporate Communications
AssuredPartners	VP Comercial Lines
AXA Investment Managers	Head of Marketing Communications
Banco Ademi	Digital Marketing Manager
Bank of America	Managing Director Strategic Initiatives
Bank of America	Senior Vice President / Region Executive
Bank of New York Mellon	Central Clearing Services - Product Owner
Barclays	AVP - Acquisition Marketing
Barclays	AVP - Acquisition Marketing
Beneficient	Director of Communications
Berger Financial Group Inc	Marketing Director
Bernicke Wealth Management	Director of Technology & Marketing
Best Interest Financial	Head of Marketing & Loan Officer
Better	Senior Lifecycle Marketing Manager
Better	Senior Paid Media Manager
Beyond Finance	Senior Paid Search Specialist
BlackRock	Manager Digital Assets Sales
BlackRock	Senior Product Manager II
Block	Senior Technical Community Manager, Block Open Source
Bloomberg	Marketing Associate
Bloomberg Tradebook	Managing Director of Client Marketing U.S., Bloomberg Media
Blueprint Financial Group	Director of D&I Strategy and Marketing
BMO	Digital Acquisition Manager, U.S. Deposits
BMO	Market President
BMO Capital Markets	Customer Experience Advisor - Retail and Premier Segments
BMO Capital Markets	Senior Digital Acquisition Manager, US Deposits
BMO Capital Markets	Thought Leadership Content and Social Media Manager
Bolton Global Capital	Chief Growth Officer
BOXX Insurance Inc	Growth Marketing & Communications Lead

SAMPLE PAST ATTENDEE LIST

2026 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Brandes Investment Partners	Marketing Director
Brandes Investment Partners & Co.	Marketing Director
Bravo Policy	Chief Product Officer
Breckinridge Capital Advisors	Senior Marketing Communications Specialist
Bridge	SVP of Marketing & Growth
Bridgehouse Asset Managers	AVP, Sales and Marketing
Brighton Capital Advisors	Director of Marketing And Communications
Broadridge Advisor Solutions	Global Head of Brand & Digital Marketing
Broadridge Advisor Solutions	Global Head of Marketing Analytics & Decision Sciences
Brown & Brown Absence Services Group	Marketing Director
Brown Brothers Harriman	Associate Firmwide Marketing & Brand
Brown Brothers Harriman	Head of Firmwide Marketing and Brand
Brown Capital Management	Digital Marketing Manager
Bryn Mawr Trust	Marketing Specialist - Wealth Management
Burford Capital LLC	Senior Associate, Event Marketing
Byline Bancorp, Inc.	Commercial Marketing Manager
Byline Bancorp, Inc.	Digital Marketing Manager
Byline Bancorp, Inc.	Lifecycle Marketing Manager
Byline Bancorp, Inc.	Marketing Analytics Manager
Byline Bancorp, Inc.	Marketing Manager
Byline Bancorp, Inc.	Senior Vice President, Head of Marketing
Byline Bancorp, Inc.	Sr. Creative Services Manager
Byline Bancorp, Inc.	Sr. Marketing Manager
C&A FINANCIAL GROUP	Marketing Director
Cambridge Associates LLC	Associate Director, Content Marketing
Cambridge Associates LLC	Senior Marketing Associate
Capchase Inc	Lifecycle Marketing Manager
Capital One	Group Product Manager - Integration
Capital One	Manager, Digital Marketing Measurement
Capital One	Principal Associate, Marketing
Capital One	Principal Associate, Marketing Strategy - Customer Acquisitions
Capital One	Principle Associate, Brand Media
Capital One	Senior Manager, Product Management - Data Foundations

SAMPLE PAST ATTENDEE LIST

2026 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Capital One	Senior Social Media Strategist
CAPTRUST	Manager II Business Development - Marketing & Sales Enablement
Carson Group	Director, Digital Strategy
Carson Group	Multimedia Specialist [Freelance]
Carson Group	SVP, Digital Enablement and Creative
Cartesian Capital Group	Investor relations & Corporate Communications lead for Cartesian portfolio companies
Center for Research in Security Prices (CRSP)	Senior Director of Marketing
Certuity	Marketing Director
Changed App	Social Media Manager
Chargeflow	Founding Growth Executive
Chase	AVP
Chase	Head of Marketing, US Advisor
Chase	Managing Director, Head of Paid Acquisition Credit Card Marketing
Chase	marketing strategy, senior associate
Chase	Senior Product Manager - Chase Private Client & JPMorgan Private Client
Chase	Vice President, Marketing Strategy Lead
Chase	VP Card Acquisition
Chase	VP, Design Lead
Chase	VP, Product Marketing Strategy Lead – Chase Home Lending
Checkbook	Growth & Revenue Operations Lead
Chicago Community Loan Fund	Marketing and Communications Professional
Chicory Wealth	Marketing & Social Responsibility Manager
Chubb	AVP, Social Media, North America
Citi	Assistant Vice President - Global CitiConnect API Product Manager
Citi	Citi Retail Services Connected Commerce Assistant Vice President
Citi	Director & Head of Marketing & Communications Delivery
Citi	Head - Digital Cross-sell Revenue (ARPU)
Citi	Head of Media
Citi	SVP - Affiliate
Clarifycapital	Director of Marketing
Clearview Federal Credit Union	Vice President, Digital Strategy and Marketing
CME Group Inc.	Director, Equity and Crypto Currency Products
CME Group Inc.	Executive Director and Associate General Counsel

SAMPLE PAST ATTENDEE LIST

2026 PAST ATTENDEE LIST

COMPANY	JOB TITLE
CME Group Inc.	Sr Pricing and Valuation Associate.
CNH Industrial Capital	Marketing Manager
CODA Markets	Director of Execution Services
Cohen & Steers Capital Management	Vice President, Head of Channel Marketing
Cohen & Steers Capital Management	VP, Head of Digital Marketing
Commercial Credit Group Inc	Marketing & Sales
Connecticut Housing Finance Authority	Marketing Manager
Convera	Head of Product Marketing
Coverdash	Head of Web & Integrations
Cream City Mortgage	Loan Officer
Cream City Mortgage	Marketing Director
CreditSights	Co-Head of Product Management
Cross River Bank	Growth Marketing
Cross River Bank	Marketing Manager
Cross River Bank	Product Marketing, Payments & Cards
Depository Trust & Clearing Corporation	Director, Digital Platforms & MarTech
Deutsche Bank	Product Manager and Client Solutions Bin Sponsorship
Deutsche Bank	Vice President, Business Product Manager
Dimensional	Digital Product Owner
Dimensional Fund Advisors	Senior Associate, Channel Marketing
Discover	Campaign Management Lead
Discover	Lead Email Marketing Strategist
Discover	Lead Marketing Programs
Discover	Principal Consumer Insights & Product Strategy
Discover	Principal Product Manager
Discover	Principal Product Owner - Strategic AI Transformation Initiatives (FRAML)
Discover	Project Manager - Acquisition Marketing
Discover	Senior Manager Marketing Technology
Discover	Senior Principal
Discover	Senior Principal, Enterprise Marketing
Discover	Sr. Manager Marketing Campaign
Droit Financial Technologies	Digital Marketing Manager
Duetti	Head of Growth

SAMPLE PAST ATTENDEE LIST

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COMPANY	JOB TITLE
E Mortgage Capital	Senior Loan Officer
Edelman Financial Engines LLC	Sr. Manager, Client Marketing
Edge One	Marketing Manager
Edward Jones	Corporate Social Media
Edward Jones	Culture of Compliance Key Leader
Edward Jones	Financial Advisor
Edward Jones	Marketing and Communications Strategy
Edward Jones	Marketing Manager
Edward Jones	Sr. Channel Manager
Edward Jones	U.S. Growth Marketing
Employees First	Senior Advisor
Employees First	SVP Sales
Enfusion	Senior Product Manager
Equifax Canada	Chief Data Officer, Data-Driven Marketing
Equitable	Complex Operations and Communications
Evangelical Lutheran Church in America	Marketing Director
Evangelical Lutheran Church in America	VP of Marketing
Exegy	Content & Product Marketing Lead
Exegy	Director, Head of Marketing
Fannie Mae	Head of SEO
Fannie Mae	Marketing Strategy Lead Associate
Farther	Head of Business and Corp Development
Fidelity Canada	Senior VP, Head of Digital Engagement
Fidelity Investments	Principal Product Owner - Brokerage Technology
Fidelity Investments	Senior Manager Marketing
Financial Recovery Strategies	Senior Vice President Marketing
Finimize Ltd	Marketing & Strategic Partnerships
First Business Bank	Director of Marketing Technology
First Business Bank	Senior Director of Marketing & Communication
First Eagle Investment Management, LLC	AVP, Digital Marketing Manager
First Insurance Funding	SVP, Marketing
First Premier Bank	Senior Technical Marketing Associate
Flashpoint	Venture Growth Investor

SAMPLE PAST ATTENDEE LIST

2026 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Flow	Growth Partner Manager
Fox Communities Credit Union	VP of Marketing Analytics & Strategy
Franklin Templeton	Sr. Marketing Specialist
Franklin Templeton Investments	Senior Marketing Associate
Franklin Templeton Investments	Social Media Director
Franklin-Madison	Business Development Representative
Franklin-Madison	Director of Growth
Freedomcapmks	Marketing & Events Manager
Fundstrat Global Advisors LLC	Chief Marketing Officer
Gallagher	Marketing Campaign Monitoring Lead
Gallagher Bassett Services Inc	Senior Marketing Manager
Gallagher Bassett Services Inc	SVP, Marketing
GAMCO Investors, Inc	Director of Marketing Gabelli Funds
GDS Link	Senior Marketing Manager
GoingVC	Product Manager / Advisor / Venture Partner
Goldman Sachs	Lead Product Manager
Goldman Sachs	Managing Director, Global Head of Content and Product Marketing
Goosehead Insurance	Owner
Graham Capital Management	Associate Marketing
Granite Creek	Marketing Manager
GreatAmerica	Vice President, Corporate Marketing
Greenwood Capital Associates Inc	Marketing Manager
Guaranteed Rate	Marketing Manager, Paid Expert
Guaranteed Rate	VP of Marketing Technology (MarTech)
Guardian Group Benefits	Director of Omnichannel & Digital Adoption
Guardian Group Benefits	Head of Strategy & Operations, Individual Markets Marketing
Guardian Group Benefits	Manager, Marketing
Guardian Group Benefits	Marketing Associate
Guggenheim Partners, LLC	Vice President, Lead Product Manager
GulfUS Cooperation Platform	Manager
GW&K Investment Management	Digital Marketing Manager
Harbor Capital Advisors	Director, Customer Growth Marketing
Harbor Capital Advisors	Head of Brand

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COMPANY	JOB TITLE
Harding Loevner	Manager, Digital Content
Harrison Street	Director Marketing & Brand Strategy
Herzfeld	Digital Marketing Associate
Herzfeld	Head of Marketing & Distribution
Herzfeld	Head of Marketing & Distribution
HFR Inc	Marketing Manager
HighTower Advisors	Chief Marketing Officer
Hiscox Limited	CRM Marketing Manager
Houlihan Lokey	VP Marketing AI
HSBC	Manager, Marketing
HSBC Investments Funds	Senior Marketing Manager, Digital Channels & Experience
Hudson River Trading	Marketing & Communications Lead
Hudson Valley Credit Union	Manager of Product Marketing
Hudson Valley Credit Union	Manager, Member Experience
Hudson Valley Credit Union	Senior Vice President, Senior Director of Marketing
Hudson Valley Credit Union	VP Commercials
IGM Financial	Vice President, Digital Marketing and Performance
Inception Capital	Branding & PR Lead
Independence Blue Cross	Associate Communications Lead
Insight Partners	Senior Product Manager, Data & AI
Institutional Investor	Executive Director, Head of Marketing Operations & Digital Strategy
Institutional Investor	Marketing Manager
Insurely	CMO
InsureYour	Manager
Integra Capital	Vice President & Head of Investor Relations & U.S. Market Relations
Intercontinental Exchange	Senior Product Manager Product Strategy
International Finance Corporation	Communications Lead, Financial Institutions Group (FIG)
IntraFi	Principal Marketing Manager
Intro-act	Curator
InvestiFi	VP of Marketing
Iskali Capital Group	Managing Director
Janney Montgomery Scott LLC	VP, Director of Marketing Operations
John Hancock	Product Owner, Long Term Care Insurance - Health and Prevention

SAMPLE PAST ATTENDEE LIST

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COMPANY	JOB TITLE
JP Morgan India Private	Executive Director, Card and Commerce Strategy Marketing Director
JP Morgan India Private	Head of Marketing, US Advisor
JP Morgan India Private	Markets & Securities Services Marketing
JP Morgan India Private	Senior Vice President, Product Development
JP Morgan India Private	Sr. Technical Product Manager
JP Morgan India Private	Vice President Marketing
JP Morgan India Private	VP, Content Production - Connected Commerce, Lifestyle Experiences & Content
JPMorgan Chase	Product Strategy Associate
JPMorgan Chase	Vice President, Marketing Strategy Lead
JPMorgan Chase and Co.	Senior Product Owner
JPMorgan Private Bank	Data Analytics and Product Strategy Associate
JPMorgan Private Bank	Product Manager, Sr Associate
JPMorgan Private Bank	Senior Associate, Production Management, Electronic Trading Technology (Equities)
JPMorgan Private Bank	Senior Lead of Commercial and Investment Bank - Markets, Sales & Research Marketing Strategy
Kapitus Servicing Inc	Director of Marketing
Kapitus Servicing Inc	Marketing Director
Kapitus Servicing Inc	Marketing Director
Kapitus Servicing Inc	Performance Marketing Manager
Kasheesh	Brand Manager
Katapult	B2B Marketing Director
Kayne Anderson Rudnick	Senior Marketing Manager
KEATING	Marketing Coordinator and Senior Client Service Manager
Kemper Corporation	Digital Marketing Manager
Kemper Corporation	Director of Strategic Innovation
Kiavi	Senior Director of Product Marketing & Communications
Kin Insurance Inc	Chief Product Officer
Knights of Columbus	Director of Investments Marketing
KPMG	Senior Associate, Corporate Communications
LAFCU	Marketing
Lev	Senior Product Manager
Lifetime Group	Team Supervisor
Liquidnet Holdings Inc	Equities Marketing Manager
Loomis Sayles & Company	Corporate Communications Associate

SAMPLE PAST ATTENDEE LIST

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COMPANY	JOB TITLE
Loomis Sayles & Company	VP, Brand and Design
Los Angeles Capital Management	Associate, Relationship Management
LSEG (London Stock Exchange Group)	Senior Associate, External Communications
LSEG (London Stock Exchange Group)	Senior Marketing Specialist
M&T Bank Corporation	Community Branch Manager
Madanplus	Chief Marketing Officer
Madanplus	Chief Marketing Officer
Manulife	AVP, Head of Marketing Affinity Markets
March Capital	Head of Institutional Sales
Mark S. Gottlieb, CPA PC	Director of Marketing and Client Relations
MarketAxess	Senior Product Marketing Manager
Markets Group	Director, Digital
MarketVector Indexes	Senior Marketing Strategist
MassMutual	Head of Marketing & Digital Strategy Chair of Diversity, Equity & Inclusion
Masterworks	SVP, Communications, Content & Partnerships
Mcgreenbank	Digital Marketing and Communications Specialist
Mcgreenbank	Director of Communications
MEMX	Market Operations Specialist
MEMX	Market Operations Specialist
Meridian Group International, Inc.	Marketing Manager
Meridian Group International, Inc.	Senior Marketing Coordinator
Mesirow Financial, Inc.	VP, Digital Marketing Strategy
MetLife	Assistant Vice President, Institutional Marketing
MetLife	Assistant Vice President, Institutional Marketing
MetLife	Content Production Specialist
MetLife	Head of Paid Media
MFS Investment Management	Senior Manager Social Media
MIAC Analytics	Vice President
Michigan Saves	Chief Program Officer
Michigan Saves	Director of Marketing and Communications
Michigan Saves	Senior Marketing Coordinator
Mid-Hudson Valley Federal Credit Union	Manager, Member Experience
Mitlin Financial	Chief Marketing Officer

SAMPLE PAST ATTENDEE LIST

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COMPANY	JOB TITLE
MoneyLion	Sr. Marketing Manager
Monstro	Senior Product Manager
Moody's Analytics	Director of Digital Marketing
Moody's Analytics	Global Employee Events Manager
Moody's Corporation	Senior Marketing Associate
Morgan Stanley	Brand Strategist
Morgan Stanley	Senior Associate, Intermediary Channel Marketing
Morgan Stanley	Senior Marketing Associate
Morningstar	Marketing Manager, Digital and Research
Municipal Credit Union	Digital Marketing Manager
Mutual of America Life Insurance Company	Manager, Social Media
Mutual of America Life Insurance Company	Program & Product Management
Mutual of America Life Insurance Company	Program & Product Management
Mutual of America Life Insurance Company	Senior Marketing Manager
Mutual of America Life Insurance Company	VP, Digital Marketing & Social Media
NABA Chicago	Vice President
Nasdaq	Director, Digital Marketing
Nasdaq	Director, Search (SEO and SEM)
National Life Group	Sr. Marketing Specialist
Neuberger Berman LLC	Brand Operations Lead
Neuberger Berman LLC	Chief Marketing Officer
Neuberger Berman LLC	Global Head of Brand Experience
Neuberger Berman LLC	Vice President, Digital Design & UX Lead
New Harbor Financial Group	Digital Marketing & Service Specialist
New York Life Insurance	Senior Communications Leader
New York Life Insurance Company	Email Marketing
New York Life Insurance Company	Senior Associate, Product Manager
New York Life Investment Management LLC	Director, Digital Properties
New York Life Investment Management LLC	Global Director, Brand & Creative
New York Life Investment Management LLC	Head of Cross Channel Marketing
New York Life Investments	Email Marketing
Nomura International plc	Head of Marketing
Northern Trust	Executive Vice President

SAMPLE PAST ATTENDEE LIST

2026 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Northern Trust	People Leader/Program Manager/ Product Owner
Northern Trust	Sr Product Manager
Northern Trust	Vice President, Wealth Client Group Marketing
Northfield Bancorp Inc	Vice President, Marketing Manager
Northwestern Mutual	Assistant Director, Marketing Operations
Northwestern Mutual	Branding Specialist
Northwestern Mutual	Branding Specialist
Northwestern Mutual	Chief Growth Officer
Northwestern Mutual	Chief Marketing Officer
Northwestern Mutual	Senior Content Strategist, Markets & Investments
Northwestern Mutual	Senior Director Digital & Field Marketing Strategy
Northwestern Mutual	Senior Director Program Management
Northwestern Mutual	VP Marketing Operations
Nuveen LLC	AVP, Marketing Automation Specialist
Nuveen LLC	Digital Marketing Manager
Octus	Growth Marketing Manager
Octus	Senior Product Marketing Manager
Odyssey Group	Digital Marketing Manager
One Point BFG, Inc.	Marketing Manager
One Way Ventures	Investment Team
OneAmerica Financial	Digital Product Owner
OneAmerica Financial	Social Media Manager
Optum Workers' Comp and Auto No-Fault	Director Product Portfolio Strategy
ORS Financial Group	CFO/Compliance Director Partner
OTC Markets Group, Inc.	VP of Communications
Panacea Financial	Director, Paid Media at Panacea Financial
Panacea Financial	Head of Marketing
Pangea.io	Director of Market Research
Parabellum Capital	Director, AI Product & Strategic Initiatives
Penserra Securities	Client Relationship Officer
PFP Services	Digital Marketing Strategist
PGIM Fixed Income	Head of Digital Marketing
Planner	Investment Products

SAMPLE PAST ATTENDEE LIST

2026 PAST ATTENDEE LIST

COMPANY	JOB TITLE
Plante Moran	Director, Marketing
Possible	Director of Product and Lifecycle Marketing
President's Choice Financial	Vice President, Acquisition and Growth
Principal	Director of Product Strategy - Individual Education and Advice
Prism Data	Head of Marketing
Produced by Monex Securites MENUWho we areContact us	Marketing Manager
ProShares	Manager, Creative Services
Prospera Financial Services	Coordinator Marketing
Prudential	CCO / US Marketing and Digital Marketing
Prudential	Chief Growth Officer - Simplified Solutions
Prudential	Compliance Director
Prudential	Digital Marketing Manager
Prudential	Digital Marketing Manager
Prudential	Director, Digital Marketing
Prudential	Director, Generative AI
Prudential	Director, Growth Marketing
Prudential	Manager Paid Media, Programmatic
Prudential	Marketing Campaign Manager
Pumpkin Insurance Services Inc	Chief Product and Growth Officer
Purcell Communications Inc	Co-Founder
PURE Insurance	Director, Marketing and Advertising
PWL Capital Montreal	Head of Brand Experience
Pzena Investment Management Ltd	Digital Marketing and Brand Manager
Quick Link Capital,Commercial Real Estate Mortgages,SBA Loans, Stock Loans	Managing Director
Raisin GmbH	Digital Marketing Manager
Raisin GmbH	VP of Marketing
RCM Alternatives	Marketing Manager
Reinsurance Group of America	Vice President, Head of Innovation, Global Valuation
Republic	Vice President, Investor Relations
RF Lafferty & Co.	First Vice President
RMBcap.com	Digital Marketing Associate
RMBcap.com	Marketing Coordinator
Rockefeller Financial LLC	Content Marketing Specialist

SAMPLE PAST ATTENDEE LIST

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COMPANY	JOB TITLE
Rockefeller Financial LLC	VP, Digital Marketing Strategy
S&P Global Inc.	Associate Director, Marketing Manager
S&P Global Inc.	Associate Director, Marketing Manager
S&P Global Inc.	Head of Digital Customer Experience
Safe Harbor Credit Union	Director of Marketing
Safe Harbor Credit Union	Marketing Specialist
Safe Harbor Financial	Chief Marketing Officer
SBG Funding	Senior SEO Manager
SCM	Deputy Communications Director
Securian Financial Group	Head of Marketing Technology & Operations
Securian Financial Group	Manager, B2B Marketing
Security Benefit	Digital Marketing Manager
Security Benefit	Marketing Specialist, Education
Security Distributors LLC	Digital Marketing Manager
Security Distributors LLC	Senior Marketing Automation Specialist
ShariaPortfolio	Marketing Manager
Shelterpoint	Lead Digital Marketing Specialist
Shelterpoint	Senior Social Media Marketing Specialist
Shorehill Capital LLC	Marketing Manager
Signal Financial FCU	VP Marketing
Six Trees Capital LLC	COO
Skyscraper Insurance	Account Executive / Producer
Skyscraper Insurance	Chief Executive Officer (CEO) & Partner
Skyscraper Insurance	President
Skyscraper Insurance	Web Developer and Marketing Manager
Smallwood Wealth Management	Marketing Director
SMBC Group	Head of Brand Marketing & Events
Smead Capital Management	Director - Marketing & Brand Development
Snowbridge Advisors	Head of Institutional Sales
Solomonpartners	Marketing Manager
Somercor	Vice President, Marketing and Engagement
Sondhelm Partners	Director
Sound Credit Union	Marketing VP

SAMPLE PAST ATTENDEE LIST

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COMPANY	JOB TITLE
Sphere	Head Of Institutional Growth
SS&C Technologies Inc	Senior Manager, Solutions Marketing
Starr Companies	Chief Marketing Officer
Stout	Marketing Associate
Stout	Marketing Director
Stout	Senior Marketing Manager
Stratus Financial	Managing Director-Head of Investor Relations
Swiss Re Corporate Solutions	SVP, Head of Product Marketing & Insights
T. Rowe Price	Marketing Manager
TCV Trust & Wealth Management	Vice President - Marketing Director
Teachers Insurance and Annuity Association of America	Director of Integrated Search
Teachers Insurance and Annuity Association of America	Global Head of Digital Marketing & Media
Teachers Insurance and Annuity Association of America	Senior Managing Director Product and Business Development
Tellus	Vice President Marketing
Tempus Inc	Head of Marketing
The Aeon Group	Vice President
The Federal Savings Bank	CMO
The Federal Savings Bank	Digital Director
The Federal Savings Bank	Senior Director of Marketing Operations
The Federal Savings Bank	Senior Vice President
The London Company	Digital Marketing Specialist
The dominion group	CMO
Theivent	Product Manager
Theivent	Product Manger, Concept & Design
Themes ETFs	Director, Communications & Advisor Relations
Thrivent Financial	Chief Growth & Generosity Officer
Thrivent Financial	Director of Media Planning & Campaigns
Thrivent Financial	Director of Social Media
Thrivent Financial	Director, Communications
Thrivent Financial	Director, Communications
Thrivent Financial	Experience Director, Digital Marketing
Thrivent Financial	VP of Brand and Integrated Marketing
TMNA Services, LLC.	Senior Marketing Associate

SAMPLE PAST ATTENDEE LIST

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COMPANY	JOB TITLE
Tompkins Financial	Assistant VP, Marketing (Tompkins VIST Bank)
Tompkins Financial	Senior Client Associate, Wealth Advisory
TPG	Senior Associate, Global Communications
Tradesk Securities, Inc.	Marketing Director
TradeUP Securities Inc.	Head Of Brokerage Services & Product Management
Tradu	President
TritonPoint Wealth	Marketing & Operations Manager
Truist	Head of Digital Commerce
Trustmark	Associate Director, Demand Generation & Marketing Operations
Trustmark	Associate Director, Demand Generation & Marketing Operations
UBS	Director, Creative Producer, UBS Studios Americas
UBS	Executive Creative Director
UBS	GWM Operating Head Digital Marketing
UBS	Head of Digital Marketing Strategy, Americas at UBS Global Wealth Management
unfcu.com	Marketing Associate
unfcu.com	Marketing Automation Specialist
unfcu.com	Senior Manager Marketing Research
unfcu.com	Strategic Marketing Associate
United Nations Federal Credit Union	Lead Integrated Marketing Associate
United Nations Joint Staff Pension Fund (UNJSPF)	Public Information Officer (Communication Officer) - Chief Executive Office
Univest	Vice President, Senior Marketing Manager
UpMarket	Investor Relations, Private Markets
USALLIANCE Financial	EVP Chief Marketing & Experience Officer CMXO
USC	Technical Product Owner
Vanguard	Product Marketing Director
Vanguard	SVP, Strategic Response Management
VantageScore Solutions LLC	Senior Director, Communications
Vela Investment Management	Content Director
Velera	Principal, Growth Strategy & Planning
Venturi Private Wealth	Director of Marketing
Vericast	Senior Account Executive, Digital
Vericast	Vice President, Financial Institution Solutions
Vestwell Holdings Inc	Content Creator

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COMPANY	JOB TITLE
Vestwell Holdings Inc	Senior Vice President Marketing
Vibrant Capital	Director - Business Development, Strategy, Investor Relations
Vista Equity Partners	MD, Head of Private Wealth Solutions Marketing & Digital
VOX Funding	Growth & Revenue Strategy
Wealth Enhancement Group	Senior Vice President, Growth Operations & Product Management
Wealthspire	Head Senior Vice President, Marketing
Webb Insurance Group	Marketing Director
Wells Fargo	Head of Cards Marketing
Wells Fargo	Head of Marketing Platforms
Wespath Benefits and Investments	Communications Content Manager
Western Union	Global Marketing Lead, SEO, ASO & GEO
Wheels, Inc.	Manager, Pricing & Profitability Analytics
William Blair & Company	IM Distribution - Marketing
William Blair & Company	Marketing Specialist
William Blair & Company	Senior Social Media & Content Development Associate
Winston Benefits	Manager of Communication Services
Wintrust	GTM Marketing Manager
Wintrust Mortgage	AVP, Creative Services Senior Manager
World Financial Group (WFG)	Marketing Director
World Insurance Associates	Digital Marketing Strategist
Worldwide Assurance for Employees of Public Agencies, Inc.	Associate Director of Digital Marketing
YELL	Social Media & Brand Strategist
YELL	Vice-President, Marketing and Sales
Zepz	Growth Specialist

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 JAN 30, 2026

\$1,095

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:

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

PRE-SALE & SUPER EARLY BIRD
EXPIRES ON JAN 30, 2026

\$895

REGULAR TICKET

\$1,395

REGISTER FOR DELEGATE PASS

Contact:

Sam Caskey

Delegate Registration Manager

Email: sam.caskey@strategyinstitute.com

GROUP RATES

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

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

MAY 7-8, 2026

OMNI CHARLOTTE HOTEL
CHARLOTTE, NC