

Digital Marketing *for* Financial Services Summit

CHARLOTTE

Post Event Report

May 7-8, 2026

Omni Charlotte Hotel,
Charlotte, North Carolina



Brought to you by:



The Digital Marketing for Financial Services (DMFS) Charlotte Summit is where the region's leading marketing, growth, digital, and customer experience executives from banking, insurance, fintech, and wealth management come together to shape the future of financial services marketing.

As a first-of-its-kind event in Charlotte, DMFS unites previously siloed disciplines — brand, performance marketing, data & analytics, personalization, digital experience, and customer strategy — into a single, integrated forum focused on driving measurable growth in a highly regulated, digital-first marketplace.

The Summit equips senior decision-makers with practical, real-world strategies to acquire, engage, and retain customers more effectively — while navigating regulatory complexity, evolving customer expectations, and increasing competitive pressure from both traditional institutions and fintech disruptors.

From AI-driven personalization, omnichannel journey orchestration, and first-party data activation to marketing compliance, trust-based engagement, and lifecycle optimization, DMFS Charlotte delivers a holistic view of what it takes to build meaningful, compliant, and profitable customer relationships today.

Anchored in the realities of today's financial services environment — shifting privacy regulations, cookie deprecation, rising acquisition costs, and accelerating technology adoption — the event bridges strategy and execution, ensuring marketing leaders leave with frameworks and tactics they can apply immediately inside their organizations.

DMFS in Numbers



150+
On-Site
Attendees



30+
Expert
Speakers



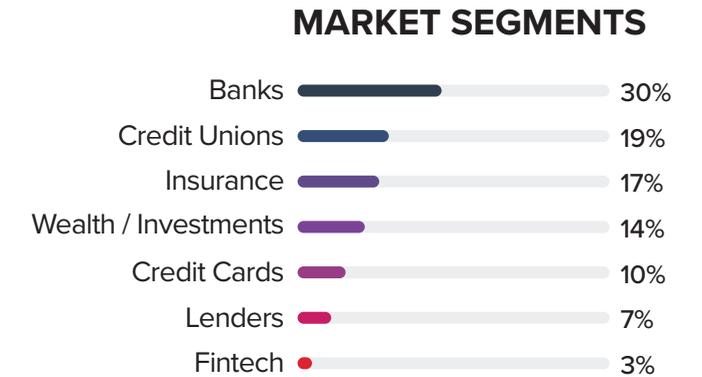
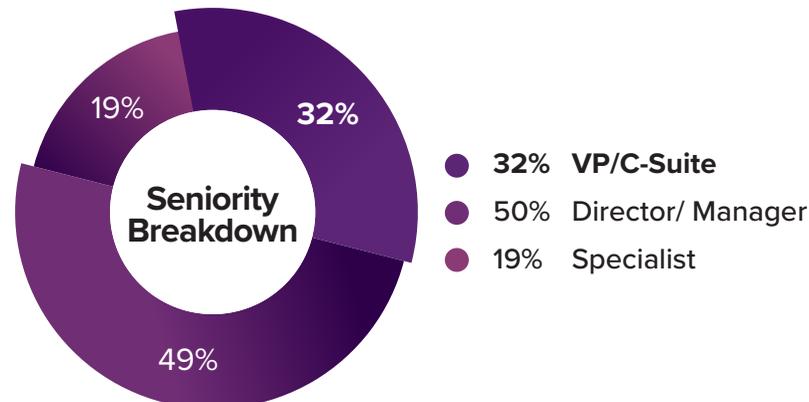
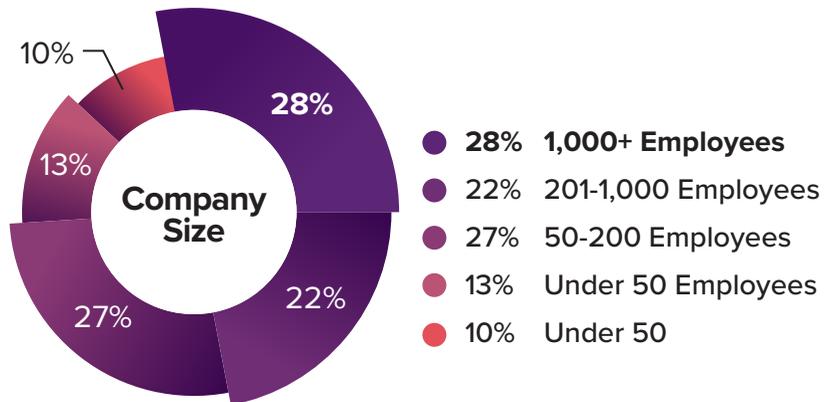
20+
Hours of Innovative
Content



10+
Hours
Networking



60%
Enterprise-Scale
Organizations



Hear From Our **DMFS** Community



I am enjoying the mix of both leadership advice and industry advice. I can't wait to share this knowledge with my team



Presenters and conversations with attendees provided diverse perspectives on key topics. It was great to learn how others are tackling common challenges & opportunities.



As a first-time attendee I walked away inspired with a list of action items to improve things



I love the variety of topics & speakers- each session offered something valuable and actionable. The 30 min format made it easy to absorb a lot of great info without feeling overwhelmed.



This conference was a refreshing experience of industry knowledge, networking, and growth opportunities. I look forward to next year



A must attend conference for marketing pros in finance with great content tailored to our industry with hot topics and fresh insights.



Discover, Network, Transform



Network

Connect with a senior, cross-functional community of CMOs, VPs of Marketing, Digital, CX, Analytics, Product, and Innovation through keynotes, interactive panels, roundtables, speed networking, sponsor showcases, and informal peer discussions — all designed to foster meaningful conversations and long-term relationships across the financial services ecosystem.

Discover

Hear from leading marketing, digital, CX, data, and growth executives in banking, insurance, fintech, and wealth as they share practical case studies and proven strategies to drive customer acquisition, engagement, and retention in a regulated, digital-first environment. Topics span AI-powered personalization, first-party data activation, omnichannel journey orchestration, performance marketing optimization, marketing compliance, privacy, and trust-based engagement.

Transform

Learn from the leaders shaping the future of financial services marketing. From responsible AI and advanced analytics to privacy-first personalization and lifecycle-driven growth, DMFS Charlotte equips you with the insights, frameworks, and tactics needed to modernize your marketing, increase ROI, strengthen trust, and deliver exceptional customer experiences at scale.

DMFS Charlotte 2025 Themes: Advancing Growth, Trust & Customer Experience Through Innovation, Data & Responsible Marketing

The DMFS Charlotte Summit 2025 brings together senior marketing, digital, CX, data, and growth leaders from banking, insurance, fintech, and wealth management to address the critical challenges — and opportunities — shaping the future of financial services marketing.

Against a backdrop of rising acquisition costs, increasing competition from fintechs, tightening privacy and compliance requirements, and rapidly evolving customer expectations, one message stands out: sustainable growth in financial services requires integrated marketing, data, and experience strategies — enabled by technology, collaboration, and a strong culture of customer-centricity and accountability.

The insights shared go beyond theory, offering a practical blueprint for how financial institutions can modernize customer acquisition, deepen engagement, and build long-term trust while navigating regulatory complexity and digital disruption.

5 Big Trends from DMFS Charlotte 2025

1 Building Customer-Centric, Performance-Driven Growth Cultures

Leaders share strategies for embedding customer obsession, experimentation, and performance accountability into everyday marketing and digital operations — ensuring alignment from frontline teams to the executive suite.

2 Leveraging AI, Data & Analytics for Smarter Growth

From AI-powered personalization and predictive modeling to advanced attribution and journey analytics, technology is emerging as a key enabler of more relevant engagement, better decision-making, and higher marketing ROI.

3 Orchestrating Seamless, Omnichannel Customer Journeys

Sessions emphasize breaking down channel silos and connecting paid, owned, and earned experiences across web, mobile, branch, contact center, and emerging platforms to deliver consistent, high-impact customer journeys.

4 Balancing Personalization, Privacy & Trust

Best practices in privacy-first data strategies, consent management, responsible AI, and marketing compliance equip teams to personalize effectively while protecting customer trust and meeting regulatory expectations.

5 Innovating Through Cross-Functional & Ecosystem Collaboration

Case studies highlight how collaboration between marketing, IT, data, compliance, product, and external partners is accelerating innovation across personalization, automation, measurement, and customer experience.

[VIEW OUR DMFS C CONTENT HUB](#) →

Our Speakers

[VIEW AGENDA →](#)



Elizabeth Avery

Vice President – Marketing
Services Team

Wells Fargo



Shannon Perrin

Vice President, Consumer
Lending Marketing

Wells Fargo



Jacob Holtgrewe

Global Head of Digital Marketing and
Media

TIAA



Katy Dugal Simpson

Chief Marketing Officer – The
Callaway Black Group

Northwestern Mutual



Juan Silvera

Executive Vice President, Chief
Marketing Officer

AgFirst Farm Credit Bank



Denise Milano Sprung

Chief Marketing Officer

Mitlin Financial



Marco Caruccio

VP of Marketing

TradeStation



Brian Clark Kahl

VP, Marketing and Corporate
Communications

Aspida



Stephen Rohrer

Head of Marketing Data

Equitable Bank



Amy Holt

Senior Vice President
Marketing

SECU

Our Speakers

[VIEW AGENDA →](#)



Jared Bellmund

Director of Marketing and Sales

ALLCHOICE Insurance



John Oxford

Chief Marketing Officer

Renasant Bank



Aggie Tuxhorn

EVP, Chief Brand Officer

Skyward Credit Union



Med Yacoub

Marketing Director

Tradesk Securities



Bradley Erickson

SVP, Director, Digital Marketing

First Citizens Bank



David Buzo

Chief Marketing Officer

Independent Advisor Alliance



Polina Zueva

Fin-Fluencer

(Ex TikTok)



Bonnie Hayban

Chief Marketing Officer (CMO)

X-Caliber Capital



Rick Lake

University Lecturer

Boston University

Activations and Experiences to Inspire and Energize



Speed Networking

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



Roundtables

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



VIP Breakfast, Lunch and Dinner Briefings

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



Evening Reception

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

Attending Organizations: Advancing Financial Services Growth Through Innovation, Trust & Collaboration

The **DMFS Charlotte Summit** brings together a diverse cross-section of the financial services ecosystem — including banks, credit unions, insurers, wealth managers, fintechs, data and technology providers, compliance and privacy leaders, consultancies, and academic institutions.

United by a shared commitment to driving sustainable growth while strengthening customer trust and regulatory alignment, participating organizations explore practical, forward-looking approaches to personalization, data activation, omnichannel experience, performance marketing, measurement, and responsible use of AI in an increasingly digital and competitive marketplace.

Their participation reinforces DMFS Charlotte’s role as a leading forum for advancing integrated marketing, data, and experience excellence in financial services — fostering cross-functional and cross-sector collaboration, and shaping the future of the industry through innovation, trust, and strategic decision-making.

Some of the incredible organizations who joined us:

- ✓ Community Capital Management LLC
- ✓ Elliott Davis LLC
- ✓ Asset Management
- ✓ PBJ Marketing
- ✓ ALLCHOICE Insurance
- ✓ Main Street
- ✓ Asset Marketing Systems
- ✓ Golub Capital

Our Sponsors

Connect with the organizations shaping the future of financial services marketing, data, and customer experience.

These sponsors play a critical role in helping financial institutions modernize growth, engagement, and measurement while navigating regulatory complexity and rising customer expectations. Through innovative technologies, expert services, and collaborative solutions, they enable banks, insurers, wealth managers, and fintechs to activate data, personalize responsibly, orchestrate seamless journeys, improve marketing performance, strengthen trust, and drive sustainable growth.

SUNDAYSKY

iQUANTI™



How to Register?

IN-PERSON PASS

FULL TWO-DAY ACCESS:

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

FACE-TO-FACE NETWORKING:

Connect and build valuable relationships with our audience of thought leaders.

5-STAR TREATMENT:

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

EXPO HALL:

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

SPEAKER PRESENTATIONS:

Take home PowerPoints and white papers addressing your biggest challenges.

ON-DEMAND ACCESS:

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

EARLY BIRD EXPIRES ON FEB 27, 2026	\$1,295
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.

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REGULAR TICKET	\$1,395

REGISTER NOW →

REGISTER FOR DELEGATE PASS

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

GROUP RATES

Enhance your team collaboration, ROI, and industry presence with our existing group discounts for groups of 3+.
Speak with **Sam** about our best rates:
Email: sam.caskey@strategyinstitute.com

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