Digital Marketing *for* Financial Services

Portfolio of Events 2026

GROW YOUR FINANCIAL SERVICES MARKET SHARE

JOIN FORCES WITH NORTH AMERICA'S **FINANCIAL MARKETING EVENT LEADER**

UPCOMING EVENTS

1	Digital Marketing for Financial Services Summit CHARLOTTE	MAY **7-8, 2026** CHARLOTTE
2	16th Annual Digital Marketing for Financial Services Summit CANADA	JUNE **10-11, 2026** TORONTO
3	8th Annual Digital Marketing for Financial Services Summit MIDWEST	OCTOBER **7-8, 2026** CHICAGO
4	13th Annual Digital Marketing for Financial Services Summit NEW YORK	OCTOBER **28-29, 2026** NEW YORK

- The **largest** and **longest-serving portfolio** of digital marketing for financial services events in North America for more than **16 years**
- **4 annual conferences** that solidify our reputation as a leader in the financial marketing space
- **15,000+ decision-makers** in our DMFS community of **senior-level buyers**
- Events attended by **CMOs, VPs** and **Directors** from top financial organizations that are looking to elevate their digital marketing
- Hybrid event platform gives you access to **the biggest names in financial marketing globally**
- **Immersive conference format** showcases your brand in an environment with in-depth engagement

HOW WE DELIVER ATTENDEES

- The premier financial marketing event series with a **strong grasp on the market** and a deep understanding of its needs
- **World-class speakers** and **leading-edge content** attract new buyers to the summit and encourage past delegates to return
- Results-driven delegate sales team **dedicated to securing your top prospects**, target companies and verticals
- **Vetted attendees** to prioritize seniority and relevance while capping sponsors to ensure the event remains unsaturated
- Active in the digital marketing for financial services field **year-round** with our finger on the pulse of **new trends** and the sector's biggest players
- Multichannel **targeted marketing campaign** to our DMFS community, including social media, paid digital, thought leadership content, personalized emails, an event website and brochure

TOP REASONS OUR **DELEGATES ATTEND**

- Source new technology partners
- Gain best practices and industry benchmarking
- Experience product demos
- Engage with peers face to face and virtually
- Connect with current solution providers
- Test drive new technology
- Meet thought leaders and visionaries
- Network with industry stakeholders
- Stay on top of market trends and innovations

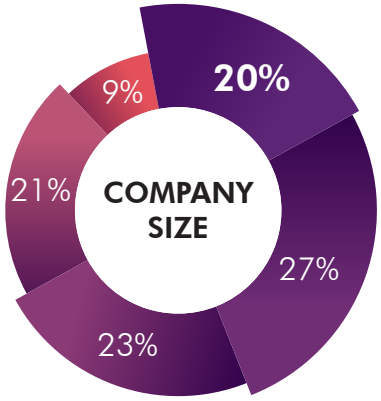
Digital Marketing *for* Financial Services Summit CHARLOTTE

MAY
7–8, 2026
CHARLOTTE

One of the premier digital marketing for financial services event series in the United States

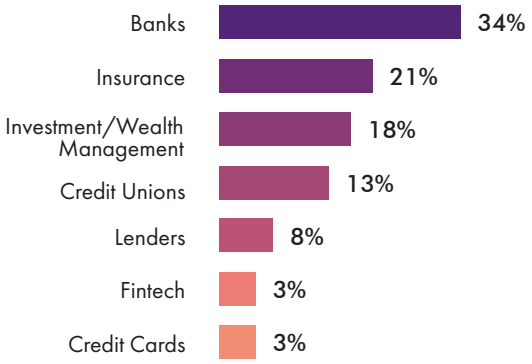
As the newest addition to our DMFS portfolio, this highly anticipated conference targets senior **financial services decision-makers** looking for solutions to advance their digital marketing.

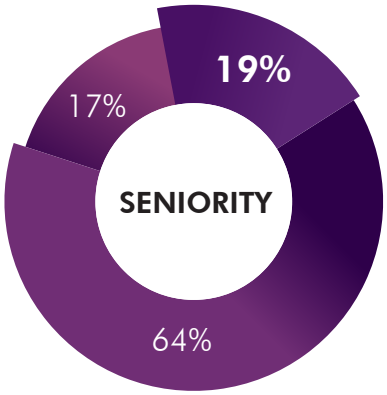
Audience Projection Based off our DMFS Portfolio



- **20%** **5,000+ employees**
- 27% 1,001 – 5,000 employees
- 23% 201 – 1,000 employees
- 21% 50 – 200 employees
- 9% Under 50 employees

MARKET SEGMENTS





- **19%** **C-Suite/VP**
- 64% Director/Manager
- 17% Marketing Specialist

KEY METRICS

Director+ qualified leads

69% of attending companies generate $100M+ in revenue

47% of attending companies have 1,000+ employees

PAST SPEAKERS FROM OUR DMFS PORTFOLIO

Maha Madain
CMO
Santander Bank

Vanessa Guajardo
CMO & Chief of Staff
US Capital Global

Jeff Wilson
SVP & Head of Marketing - Business, Corporate & Investment Banking
Citizens Bank

Nidhi Daga
SVP, Growth & Digital Platform
J.P. Morgan Chase

Ben Stuart
CMO & Head of US Marketing Strategy & Integration
BMO Financial

Ravi Misquitta
SVP, Marketing Strategy & Technology
Franklin Templeton

Shabina Anwar
VP, Global Loyalty Product Management
Mastercard

John Renz
VP, Head of Creative, US Businesses
Prudential Financial

PAST ATTENDEES FROM OUR DMFS PORTFOLIO

BANK OF AMERICA
WELLS FARGO ASSET MANAGEMENT
CARROLL FINANCIAL
TRUIST
Charlotte Metro CREDIT UNION
ally
LPL Financial
BARINGS
TRULIANT Federal Credit Union
FIFTH THIRD
American Century Investments®
Self-Help Credit Union
MetLife
Aflac
Principal℠
SECU
Vanguard
TRAVELERS

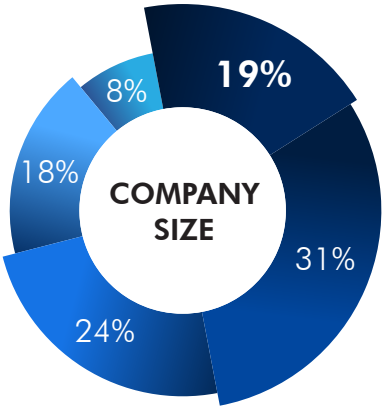
16th Annual

Digital Marketing *for* Financial Services Summit CANADA

JUNE
10–11, 2026
TORONTO

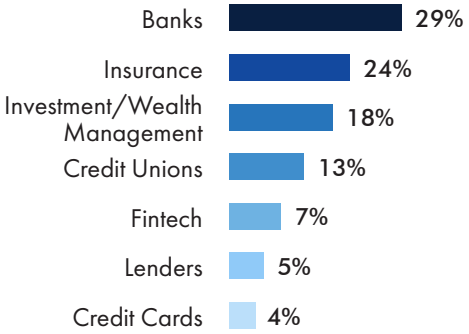
Canada's largest and longest-running digital marketing for financial services event series

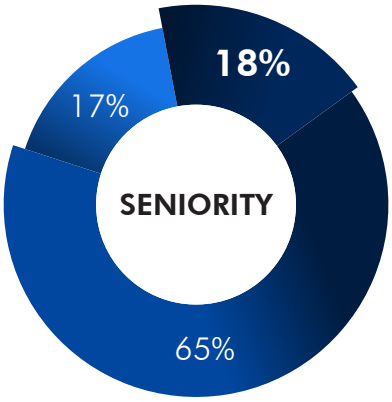
This flagship Canadian conference attracts **financial marketers** actively looking to invest in solutions to transform their digital engagement.



- **19% 5,000+ employees**
- 31% 1,001 – 5,000 employees
- 24% 201 – 1,000 employees
- 18% 50 – 200 employees
- 8% Under 50 employees

MARKET SEGMENTS





- **18% C-Suite/VP**
- 65% Director/Manager
- 17% Marketing Specialist

KEY METRICS

Director+ qualified leads

68% of attending companies generate $100M+ in revenue

50% of attending companies have 1,000+ employees

PAST SPEAKERS

Betsey Chung
SVP & Global Chief Marketing Officer
TD Bank

Alan Depencier
CMO, Personal, Commercial Banking & Insurance
RBC

Chris Hewitt
Global Head of Brand, Digital Marketing & Marketing Technology
Sun Life Financial

Renu Sihra Sehmi
Head of Enterprise Digital Marketing Operations
Scotiabank

Katy Dugal Simpson
CMO – The Callaway Black Group
Northwestern Mutual

Margaret Adaniel
VP, Digital, Marketing & Communications
CIBC

Siddharth Vishwanathan
Head of Digital Acquisition
BMO Financial Group

Leanne Nullmeyer
AVP, Marketing & Brand Experience
IG Wealth Management

PAST ATTENDEES

Manulife · Capital One · Meridian · Allstate (You're in good hands.) · ATB Financial · Fidelity Investments · Raymond James · GreenShield · National Bank of Canada · Insurely · Cambrian Credit Union · VISA · Forstrong Global · CIBC Mellon · Desjardins · HOOPP Healthcare of Ontario Pension Plan · CNA · avisowealth

PAST SPONSORS

sas · Adobe · Deloitte. · maru/ · sprinklr · Optimizely · DEMANDBASE · SITECORE · ENVIRONICS ANALYTICS · messagepoint · Hootsuite · iQUANTI · MARIGOLD · Pinterest · search engine people · SOCi · yext · VERSACOM

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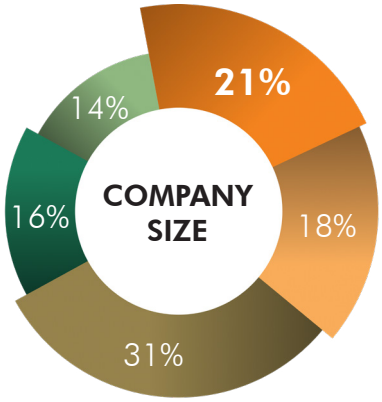
8th Annual

Digital Marketing *for* Financial Services Summit MIDWEST

OCTOBER
7–8, 2026
CHICAGO

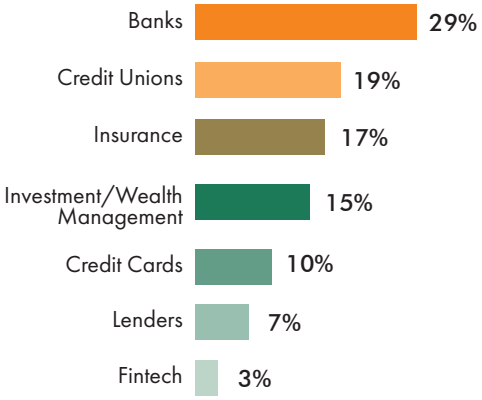
The premier digital marketing event series for financial leaders in the Midwest

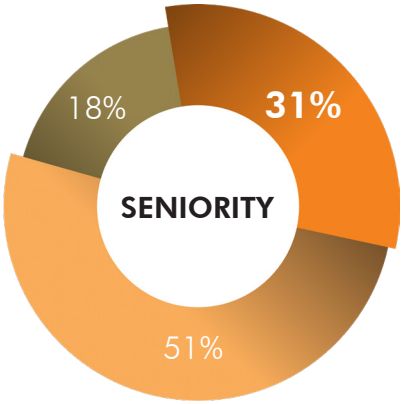
This exclusive conference connects top solution providers with **financial marketing innovators** in the Midwest.



- **21% 5,000+ employees**
- 18% 1,001 – 5,000 employees
- 31% 201 – 1,000 employees
- 16% 50 – 200 employees
- 14% Under 50 employees

MARKET SEGMENTS





- **31% C-Suite/VP**
- 51% Director/Manager
- 18% Marketing Specialist

KEY METRICS

Director+
qualified leads

59%
of attending companies generate $100M+ in revenue

PAST SPEAKERS

David Partain
SVP & Global CMO, FlexShares ETFs
Northern Trust Asset Management

Vijay Konduru
EVP & CMO
Huntington National Bank

Brent F. Korte
SVP & CMO
Ameritas

Judy Edelson
CMO
Apple Bank

Monu Kalsi
VP, Marketing
CNO Financial Group

Alejandra Denda
CMO
The Federal Savings Bank

Sumeet Grover
Chief Digital & Marketing Officer
Alliant Credit Union

Danielle Bateman Girondo
CMO
Midwest BankCentre

PAST ATTENDEES

DISCOVER FINANCIAL SERVICES · M&T Bank · State Farm · CME Group · LMCU · firstmidwest
TruStage · ALLIANT · Citizens · Gerber Life Insurance · MetLife · First American Bank
MJW MORTGAGE · TRI-MERIT SPECIALTY TAX SERVICES · Mesirow Financial · Fidelity INVESTMENTS · FirstUnited SPEND LIFE WISELY · COMPEER FINANCIAL

PAST SPONSORS

TEALIUM · vidmob · moengage · Seismic · Hootsuite · Resultlicks · PHASE 5
PANTHEON · YeXT · NH NINA HALE · Adthena · C3 Metrics · EXTOLE · Instapage · XCENTIUM

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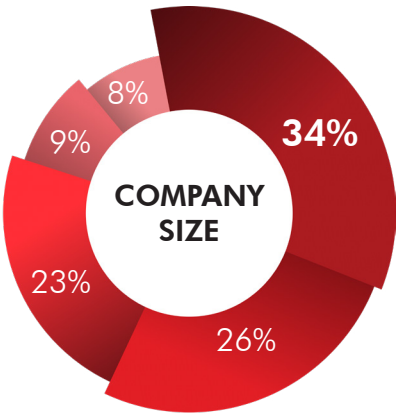
13th Annual

Digital Marketing *for* Financial Services Summit NEW YORK

OCTOBER
28–29, 2026
NEW YORK

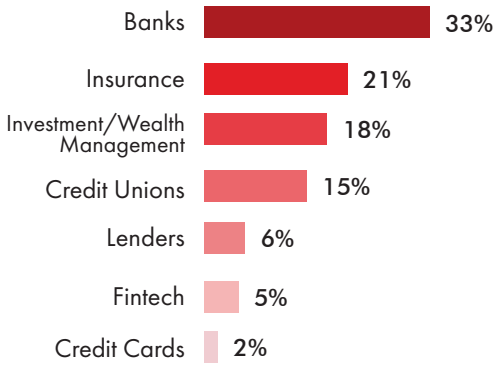
The largest and longest-running digital marketing for financial services event series in the United States

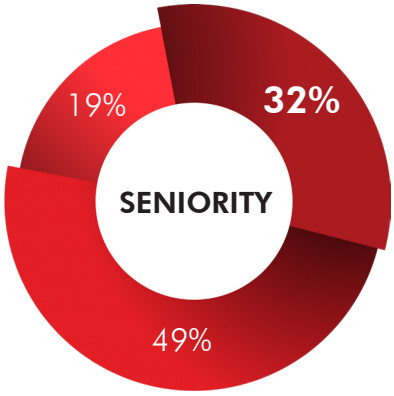
This innovative conference attracts **financial services executives** actively looking to invest in solutions to enhance their marketing and branding campaigns.



- **34% 5,000+ employees**
- 26% 1,001 – 5,000 employees
- 23% 201 – 1,000 employees
- 9% 50 – 200 employees
- 8% Under 50 employees

MARKET SEGMENTS





- **32% C-Suite/VP**
- 49% Director/Manager
- 19% Marketing Specialist

KEY METRICS

Director+ qualified leads

71% of attending companies generate $100M+ in revenue

60% of attending companies have 1,000+ employees

PAST SPEAKERS

Amy Hu
SVP & CMO
New York Life Insurance Company

Lynn Teo
Chief Marketing Officer
Northwestern Mutual

Jennifer Ball
Chief Marketing Officer
Franklin Templeton

Walter Agumbi
Managing Director, Global Head of Content & Product Marketing
Goldman Sachs Asset Management

Martiña Gago
SVP, Head of Content Strategy, Personal Banking & Wealth Management
Citi

Rich Smith
Chief Product & Marketing Officer
PenFed Credit Union

Henry Detering
Chief Marketing Officer
Neuberger Berman

Amresh Mathur
SVP, Head of Digital Acquisition & Customer Experience
Citizens

PAST ATTENDEES

J.P.Morgan · Goldman Sachs · Morgan Stanley · BlackRock · T.RowePrice · Prudential
Bank of America · TIAA · Edward Jones · Woodruff Sawyer · Penn Mutual · Blackstone
Columbia Threadneedle Investments · BNY · Morningstar · mastercard · Liberty Mutual. Insurance · State Street

PAST SPONSORS

Adobe · Seismic · Sitecore · eClerx · Epsilon · moengage · CheQ · DemandBase · sas
storyful. · kaltura · Amplitude · Outlier · maru/ · GLASSBOX · dynamic yield by mastercard · Broadridge · Nielsen

SPONSOR TESTIMONIALS

"There is no other event that brings industry leaders in the same room with high intent. DMFS has done a great job of getting highly relevant companies and their highly engaged decision-makers through the door … This is our third DMFS and has probably been our best to date. Every event seems to get better than the one that proceeds it. Certainly feels like feedback is being heard and acted upon! The attendance and engagement was high, and delegates were interested in learning more about us … In-person networking was great, everyone was approachable and able to have deeper conversations. Great event for branding and meeting the right people … Communication leading up to the event was also great. I had all the information I needed and ready to go coming to the start of the conference.

iQUANTI

"We've participated both in Canada and the U.S. and will continue to do so … Everyone here is someone who is very highly engaged in marketing, very highly engaged in digital, and they're all interested in getting to that next stage.

Hootsuite

"Great event for any organization looking to raise their profile and reach a target audience in the financial service sector! Well organized conference. Good networking opportunities. Clear communication and organization. Interesting content … It was amazing working with the entire DMFS event staff.

PHASE 5

"DMFS is the place to be for all professionals working in, near, or far from the industry of financial services. Our experience was full of insightful conversations, good meetings and very high-quality leads.

TRSB
Translating Challenges Into Solutions

"Great event. High-quality attendees and conversations with the right personas. Pleased with the engagement and we plan to come again.

MARIGOLD

"First time we attended. Very refreshing. Great experience. Lots of new connections … Very good sessions. We learnt so much! … The communication leading up to the event was spot on.

SITEPLUG

"I think the quality of people is fantastic. I had a lot of great conversations and a lot of great leads for us to be calling on.

Broadridge

"Amazing and fun event to attend! Lots of great thought leaders from the industry to share and gather insights. There was also a lot of support from the Strategy Institute team.

Dialog Insight

YOUR SPONSORSHIP **PACKAGES**

GOLD

- One of our most prestigious sponsorship opportunities with **a premium slot on the agenda** and **maximum exposure**.
- It features a **30-minute speaking session** as well as a fully branded exhibit booth.
- The package also includes:
  - A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - Access to the complete delegate and speaker list
  - 3 all-access VIP passes for your team
  - 10 additional complimentary passes to invite your clients and prospects

SILVER

- The silver package provides the perfect opportunity to **demonstrate your brand's expertise on key themes important to the community**.
- It includes a speaking or moderating spot on a **30-minute panel** as well as a fully branded exhibit booth.
- The package also includes:
  - A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - Access to the complete delegate and speaker list
  - 3 all-access VIP passes for your team
  - 10 additional complimentary passes to invite your clients and prospects

YOUR SPONSORSHIP PACKAGES

BRONZE

- Are your main sponsorship goals brand awareness and networking? The bronze package allows you to **display your products onsite and network with prospects face to face**.
- You are provided with a **prime booth location** to demo your products and access to all networking sessions onsite.
- The package also includes:
  - A fully customizable exhibit booth
  - A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
  - Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
  - Access to the complete delegate and speaker list
  - 2 all-access VIP passes for your team
  - 10 additional complimentary passes to invite your clients and prospects

NETWORKING

- As an entry-level sponsorship opportunity, **get a feel for the seniority and relevance of our DMFS audience** with the chance to attend the event and leverage onsite branding.
- The package also includes:
  - 2 all-access VIP passes for your team
  - Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials as well as promotion through a co-marketing campaign

ADDITIONAL OPPORTUNITIES

TAILORED TO YOUR BUSINESS NEEDS

What better way to connect with potential prospects than through a host of engaging onsite activities or premier branding opportunities.

- Roundtables
- Exclusive Evening Reception
- Conference Host
- Breakfast Briefing
- VIP Hosted Dinner
- Exclusive Lanyards
- Lunch & Learn
- Wifi

SECURE YOUR SPOT NOW

Book a call to learn how this opportunity can help you generate new leads and increase your pipeline!

Darren Haughian
Sponsorship Director

Call: **1-866-298-9343 x 276**
darren@strategyinstitute.com

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13th Annual Digital Marketing for Financial Services Summit NEW YORK	OCTOBER **28-29, 2026** NEW YORK www.financialdigitalmarketingus.com