

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

May 7 & 8, 2026

Omni Charlotte Hotel
Charlotte, North Carolina

The **leading event series** in
the United States for financial marketers



Financial marketing is moving fast: Expectations are higher, attention is harder to earn, and AI is rewriting the rules in real time.

DMFS Charlotte is a high-energy, in-person summit for banking and financial services teams shaping the future of digital growth. Expect sharp perspectives on customer experience, lifecycle performance, personalization, and the data foundations that make modern marketing work.

Across two days, you'll hear practical playbooks and real examples from the people doing the work: what's driving acquisition and retention right now, how teams are using AI responsibly, and how to measure impact in a privacy-first world. Come to get inspired, and leave with a clearer strategy and a stronger network.

2026 Summit **Highlights**

01

Big content density

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

03

C-suite growth perspective

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

05

Compliance-ready storytelling

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

07

Interactive peer connection

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

02

Proven attendee experience

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

04

Modern audience strategy

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

06

Data + MarTech for personalization

Take home strategies to integrate platforms and deliver personalized engagement.

08

Full experience, flexible access

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

Is Your Role Here?

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

Marketing

Marketing Operations, Marketing Strategy, Digital Marketing, Customer/Client/Consumer Engagement, Social Media, Content, Brand

Customer Experience

Customer/Client Experience, Customer Insight & Analytics, Customer Journey

Digital

Digital Transformation, Digital Strategy, Digital Innovation, Digital Experience, Digital Distribution, Digital Product, Personalization.

Data Analytics & Insights

Marketing Analytics, Customer Insight



Who Attends?

Senior marketers from many of North America's most recognizable financial brands participate in DMFS events.

Recent DMFS delegates and speakers include leaders from:



Trusted by Leading Financial Institutions

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

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



Sr. Director of EFX Strategy: It's valuable to hear how industry leaders are solving complex problems.



Associate Director of Digital Marketing: Relevant, engaging sessions; strong breakouts; well-rounded speakers.



Well-thought-out topics, great speakers, and not too bank-heavy.



An incredible networking opportunity. I learned how to leverage AI to break through with content.



As a first-time attendee, I walked away inspired with a list of action items.



Educational and thought-provoking. Has a space for my direct vertical is game-changing.



Actionable insights on AI, data, and strategy. Great peer connections with people who get our challenges.



The event was well produced.



Agenda at a Glance

Eastern Std. Time	DAY 1 - Thursday, May 7, 2026
7:30 AM	Registration & Networking Breakfast: Build Community Contacts
8:45 AM	Opening Remarks From The Chairperson
9:00 AM	Keynote: Markets In Motion
9:30 AM	Industry Expert: Ai-Powered Analytics
10:00 AM	C-Suite Panel Discussion: Emotional Storytelling Meets Tech-driven Efficiency
10:45 AM	Speed Networking! Make Meaningful Connections
11:00 AM	Refreshments Break & Exhibitor Lounge: Visit Booths & Source Expertise
11:30 AM	Tracks: Brand & Customer Authenticity / Streamlining With Technology
12:00 PM	Case Studies: Marketing To The Next Generation / AI-Agents For Growth
12:45 PM	Panel Discussion: Grassroots Marketing / Accelerating Growth With Ai-enabled Insights
1:15 PM	Networking Lunch & Exhibitor Lounge: Delve Into Industry Conversations
2:15 AM	Industry Expert: Search Reimagined
2:45 PM	Workshops: AI-Driven Team Blueprint/financial Advisor Marketing / Influencer-first Content Strategy
3:30 PM	Refreshments Break & Exhibitor Lounge: Attend Vendor Demos & Consult Industry Experts
4:00 PM	Keynote Presentation: The Power Of Leading With Joy
4:30 PM	Case Study: Creative Risk-taking In Financial Marketing
5:00 PM	Keynote Presentation: Growth At Scale
5:30 PM	End Of Day One Summary & Closing Remarks
5:45 PM	Evening Reception: Enjoy Great Conversation, Music, & Networking

Eastern Std. Time	DAY 2 - Friday, May 8, 2026
8:00 AM	Networking Breakfast: Build Community Contacts
8:45 AM	Opening Remarks From The Chairperson
9:00 AM	Keynote Presentation: The Convergence Play
9:30 AM	Industry Expert: AI & Brand Governance
10:00 AM	Panel Discussion: The AI Acceleration Paradox
10:45 AM	Refreshments Break & Exhibitor Lounge: Visit Booths & Source Expertise
11:15 AM	Roundtable Discussions: When Data Is Scarce / Affiliate And Partner Marketing / The Future Of Wealth / Social Media ROI / GenAI, Compliance, And Creativity / Insurance Marketing For The Digital Age
12:00 PM	Case Studies: Intelligent Content Engine / Staying Ahead Of The Game In Martech
12:30 PM	Industry Experts: Customer Trust Dividend / Digital Experience Acceleration
1:00 PM	Networking Lunch & Exhibitor Lounge: Delve Into Industry Conversations
2:00 PM	Case Studies: Prompt {R}evolution / The Modern Marketing Playbook
2:30 PM	Industry Experts: Compliant Media Orchestration / Video Content In Finance
3:00 PM	Refreshments Break & Exhibitor Lounge: Visit Booths & Win Prizes
3:30 PM	Panel Discussion: The Velocity Of Customer Intelligence
4:15 PM	Closing Keynote: Building Blocks For Branding
4:45 PM	Closing Remarks & End Of Summit

Featured Speakers

[View All Speakers →](#)

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



Elizabeth Avery

VP, Marketing Services Team



Shannon Perrin

VP, Consumer Lending Marketing



John Oxford

CMO



Lindsey Fielding

Chief Marketing Officer



Dr Maria McLendon

Chief Marketing Officer



Bradley Erickson

SVP, Director, Digital Marketing



Jacob Holtgrewe

Global Head of Digital Marketing & Media



Harish Naik

Head of Marketing Tech & Innovation Labs



Katy Dugal Simpson

Chief Marketing Officer, The Callaway Black Group



Juan Silvera

Chief Marketing Officer



Steve Donohue

Senior VP of Marketing, Institution Services



Denise Milano Sprung

Chief Marketing Officer



Featured Speakers

[View All Speakers →](#)

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



David Buzo

Chief Marketing Officer Independent Advisor Alliance



Daniel Darst

Deputy CMO flagstar



Med Yacoub

Marketing Director Tradesk



Bonnie Habyan

Chief Marketing Officer X-CALIBER



Helen Griffith

Vice President of Marketing SHARONVIEW FEDERAL CREDIT UNION



Gus Kroustalis

VP, Head of Digital Marketing CAPITAL BANK



Marco Carrucci

Vice President, Marketing TradeStation



Brian Clark-Kahl

VP, Marketing & Communications ASPIDA



Stephen Rohrer

Head of Marketing Data & AI Equitable Bank



Maggie Lukas

Head of Digital Bank Marketing Forbright BANK



Amy Holt

Senior Vice President, Marketing secu



Jared Bellmund

Director, Marketing & Sales ALLCHOICE INSURANCE

7:30–8:45 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.

8:45–9:00 AM

Opening Remarks From The Chairperson

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

9:00–9:30 AM

Keynote: Markets In Motion

Safeguarding Performance and Driving Growth Amid Uncertainty

- 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.

9:30–10:00 AM

Industry Expert: AI-Powered Analytics

Elevate Your Campaign Performance and Personalization with Advanced Analytics

- 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.

10:00–10:45 AM

C-suite Panel Discussion: Emotional Storytelling Meets Tech-Driven Efficiency

Merging Empathy and Innovation to Win Hearts and Minds

- 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.



Med Yacoub
Marketing Director
Tradesk



Lindsey Fielding
Chief Marketing Officer
Backflip



Dr. Maria McLendon
Chief Marketing Officer
First South Credit Union



Moderator

David Buzo
Chief Marketing Officer
Independent Advisor
Alliance

10:45–11:00 AM

Speed Networking! → Make Meaningful Connections

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

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

11:00 -11:30 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.

11:30–12:00 AM

TRACK A:
BRAND & CUSTOMER AUTHENTICITY

INDUSTRY EXPERT: HYPER-PERSONALIZATION AT SCALE

AI-Powered Campaigns that Anticipate Needs and Boost Conversion

- 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.

12:00–12:45 PM

CASE STUDY: MARKETING TO THE NEXT GENERATION

Shifting Strategies to Engage Younger Generations

- 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.



Juan Silvera
Chief Marketing Officer
AgFirst Farm Credit Bank

TRACK B:
STREAMLINING WITH TECHNOLOGY

INDUSTRY EXPERT: TECHNOLOGY-ENABLED CHANGE MANAGEMENT

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

- 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.

CASE STUDY: AI-AGENTS FOR GROWTH

Automating Campaign Planning, Budget Allocation, and ROI Optimization

- 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.



Gus Kroustalis
VP, Head of Digital Marketing
Capital Bank N.A

12:45–1:15 AM

TRACK A:
BRAND & CUSTOMER AUTHENTICITY

PANEL DISCUSSION: GRASSROOTS MARKETING

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

- 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.



Amy Holt
Senior VP, Marketing
SECU



Bradley Erickson
SVP, Director, Digital Marketing
First Citizens Bank



Jamie Horwitz
Chief Marketing Officer
Community Capital Management
Moderator

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

- 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.



David Buzo
Chief Marketing Officer
Independent Advisor Alliance



Helen Griffith
VP of Marketing
Sharonview Federal Credit Union



Jorie Walsdorf
Head of Marketing
Clarity Pay
Moderator

1:15–2:15 PM

Networking lunch & exhibitor lounge: delve into industry conversations

- Meet interesting speakers and pick their brains on the **latest industry issues**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **marketing colleagues**.

2:15–2:45 PM

Industry Expert: Search Reimagined

Navigating AI-Native Query Experiences and Intent Signals

- 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.

2:45–3:30 PM

Workshop (30 Mins)

WORKSHOP A: AI-DRIVEN TEAM BLUEPRINT

Mapping Automation, Augmentation, and New Roles for Maximum Impact

- 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.



Jorie Walsdorf
Head of Marketing
Clarity Pay

WORKSHOP B: FINANCIAL ADVISOR MARKETING

Driving Brand Consistency and Sales Impact Through Strategic Enablement

- 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.



Brian Clark-Kahl
VP, Marketing &
Communications
Aspida

WORKSHOP C: INFLUENCER-FIRST CONTENT STRATEGY

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

- 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.



Polina Zueva
Fin-Fluencer
Ex Tik-Tok

3:30–4:00 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.

4:00–4:30 PM

Keynote Presentation: The Power Of Leading With Joy

Human-centered marketing that builds connections and drives organic growth

- 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.



Denise Milano Sprung
Chief Marketing Officer
Mitlin Financial, Inc

4:30–5:00 PM

Keynote Presentation: Growth at Scale

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

- 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.



Elizabeth Avery
Vice President,
Marketing Services Team
Wells Fargo

Join the Digital Marketing for Financial Services Community

5:00–5:15PM

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!

5:15PM

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!



8:00–8:45 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.

8:45–9:00 AM

Opening Remarks From The Chairperson

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

9:00–9:30 AM

Keynote Presentation: The Convergence Play

Where Digital Payments, Rewards, Marketing, and Brand Activation Become One Engine

- Integrate payments, rewards, and behavioral data into your marketing engine to trigger meaningful, real-time brand moments
- Connect your rewards strategy directly to your brand promise, turning everyday payments into a measurable value exchange.
- Deploy omnichannel marketing activation that extends from the payment interaction to personalized digital touchpoints.
- Strengthen organizational insights with unified dashboards for payments performance, customer engagement, and marketing attribution.



John Oxford
Chief Marketing Officer
Renasant Bank

9:30–10:00 AM

Industry Expert: Ai & Brand Governance

Safeguarding Trust while Deploying Generative Content at Scale

- 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.

10:00–10:45 AM

Panel Discussion: The Ai Acceleration Paradox

Turning Compliance Anxiety into a Competitive Edge

- 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.



Shannon Perrin
VP, Consumer Lending
Marketing
Wells Fargo



Stephen Rohrer
Head of Marketing Data & AI
Equitable



Med Yacoub
Marketing Director
Tradesk
Moderator

10:45–11:15 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.

GROUP RATES

To check if you are eligible for a group rate, please contact:



Sam Caskey
Delegate Relationships Manager - DMFS
Strategy Institute
Email: sam.caskey@strategyinstitute.com

11:15 -12:00 PM

Roundtable Discussion (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



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

12:00–12:30 PM

TRACK A:
BRAND & CUSTOMER AUTHENTICITY

CASE STUDY: INTELLIGENT CONTENT ENGINE

Data-Driven Creation and Distribution for Maximum Relevance

- 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.



Katy Dugal Simpson
Chief Marketing Officer, The
Callaway Black Group
Northwestern Mutual

TRACK B:
STREAMLINING WITH TECHNOLOGY

CASE STUDY: STAYING AHEAD OF THE GAME IN MARTECH

Enhancing MarTech Integration with Legacy Systems

- 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.



Tony Fazzini
Vice President, Marketing
TradeStation

12:30–1:00 PM

TRACK A:
BRAND & CUSTOMER AUTHENTICITY

INDUSTRY EXPERT: CUSTOMER TRUST DIVIDEND

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

- 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.

TRACK B:
STREAMLINING WITH TECHNOLOGY

INDUSTRY EXPERT: DIGITAL EXPERIENCE ACCELERATION

Transforming Financial Services with Streamlined Technology and Personalization

- 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.

1:00–2:00 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 **marketing colleagues**.

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May 7-8, 2026 | Charlotte, North Carolina

Super Early Bird Rate Available Now

Secure your DMFS Charlotte pass at the lowest price of the year.

2:00–2:30 PM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

**CASE STUDY: PROMPT {R}EVOLUTION
7 Archetypes That Transform AI into
GTM Success**

- Identify your team’s AI maturity level using the 7 Evolutionary Prompt Archetypes—guiding individuals from experimentation to expert prompting.
- Apply the 7 Functional Prompt Archetypes to structure AI prompts that drive tangible go-to-market (GTM) outcomes—planning, messaging, content, compliance, and more.
- Build a scalable prompting system that boosts productivity, amplifies messaging, and delivers measurable GTM performance across your marketing operations.



Rick Lake
University Lecturer
Boston University

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

**CASE STUDY: THE MODERN
MARKETING PLAYBOOK
Bridging Data, Creativity, and Business
Strategy to Drive Growth**

- 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.



Jared Bellmund
Director, Marketing & Sales
ALLCHOICE Insurance

2:30–3:00 PM

**TRACK A:
BRAND & CUSTOMER AUTHENTICITY**

**INDUSTRY EXPERT: COMPLIANT
MEDIA ORCHESTRATION**

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

- 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.

**TRACK B:
STREAMLINING WITH TECHNOLOGY**

**INDUSTRY EXPERT: VIDEO CONTENT
IN FINANCE**

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

- 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.

3:00–3:30 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.

3:30–4:15 PM

Panel Discussion: The Velocity Of Customer Intelligence

Breaking Data Bottlenecks to Achieve 10x Marketing Speed

- 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.



Harish Naik
Head of Marketing Tech &
Innovation Labs
Ally

4:15–4:45 PM

Closing Keynote: Building Blocks For Branding

Elevating Brand Strength Through Every Touchpoint of the Member Experience

- Ensure every touchpoint—website, applications, service channels, underwriting, and communication SLAs—supports a cohesive and intuitive brand experience.
- Align marketing, operations, lending, and technology teams around member-experience accountability to reduce friction and improve outcomes.
- Build organizational buy-in by demonstrating how brand experience directly impacts marketing performance and bottom-line results.



Aggie Tuxhorn
EVP, Chief Brand Officer
Skyward Credit Union

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.

Stay at the Omni Charlotte Hotel

Uptown, Walkable Location

In the heart of Uptown Charlotte, the Omni sits steps from the financial district, dining, and entertainment—plus it's connected to the Overstreet Mall for easy movement.

Built for Networking

Onsite meeting spaces and shared lounges make it simple to connect with attendees, speakers, and sponsors before and after sessions—without leaving the venue.

Comfortable, Self-Contained Stay

Work-friendly guest rooms with modern amenities and Wi-Fi, plus convenient onsite dining for coffee, breakfast, and cocktails, keeps your team focused and fueled all day.

[Book Your Room Now →](#)

***subject to availability



Register for DMFS Charlotte 2026

RSVP TODAY →

FINANCIAL MARKETING'S TOP LEADERS REVEAL BREAKTHROUGH DIGITAL GROWTH STRATEGIES

- ☑ **MASTER AI-POWERED MARKETING:** Learn how Wells Fargo, Ally, and Equitable are leveraging advanced analytics, AI agents, and automation to supercharge campaign performance, slash inefficiencies, and redirect resources to high-impact growth.
- ☑ **CRACK THE PERSONALIZATION CODE:** Access proven frameworks from Capital Bank, AgFirst Farm Credit Bank, and First Citizens Bank for deploying hyperpersonalization at scale that drives superior acquisition and retention results.
- ☑ **UNLOCK NEXT-GEN AUDIENCE GOLDMINES:** Exclusive case studies reveal how leading financial brands engage younger generations through platform-native tactics, values-driven storytelling, and real-time social signals that convert.
- ☑ **TRANSFORM COMPLIANCE INTO COMPETITIVE ADVANTAGE:** C-suite leaders from Renasant Bank, First South Credit Union, and Backflip share strategies to turn regulatory constraints into streamlined, compliance-ready campaigns that outperform the competition.
- ☑ **REVOLUTIONIZE YOUR MARTECH STACK:** Discover how TIAA, Northwestern Mutual, and LPL Financial integrate cutting-edge platforms, break down legacy silos, and deliver personalized customer experiences that boost engagement and bottom-line growth.
- ☑ **NAVIGATE THE AI ACCELERATION PARADOX:** Get insider strategies for deploying generative AI responsibly — balancing innovation, brand governance, and compliance — while maximizing speed-to-market and marketing ROI.
- ☑ **JOIN AMERICA'S ELITE FINANCIAL MARKETING NETWORK:** Connect with 40+ senior marketing leaders from Bank of America, JPMorgan Chase, BlackRock, Vanguard, Goldman Sachs, and more — all redefining the future of digital financial marketing.