

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
7:45 AM	Registration & Networking Breakfast: Build Community Contacts
8:45 AM	Opening Remarks From The Chairperson
9:00 AM	Keynote Presentation: The Power of Leading with Joy
9:30 AM	The AI Playbook for Turning Your Financial Services Website into a Revenue Engine
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	Industry Expert: Cross-Sell is a Decision Problem
12:00 PM	Case Studies: Marketing to The Next Generation
12:45 PM	Panel Discussion: Grassroots Marketing
1:15 PM	Networking Lunch & Exhibitor Lounge: Delve Into Industry Conversations
2:15 PM	Exhibit Time
2:30 PM	Industry Expert: Decoding Ai Search
3:00 PM	Workshops: AI-Driven Team Blueprint / Influencer-first Content Strategy
3:45 PM	Refreshments Break & Exhibitor Lounge: Attend Vendor Demos & Consult Industry Experts
4:15 PM	Panel Discussion: Accelerating Growth with Ai-Enabled Insights
4:45 PM	Case Study: Ai- Agents for Growth
5:15 PM	End Of Day One Summary & Closing Remarks
5:20 PM	Evening Reception: Enjoy Great Conversation, Music, & Networking

Eastern Std. Time	DAY 2 - Friday, May 8, 2026
7:45 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	Case Study: The Shifting Role of Marketing Channels
10:00 AM	Case Study: 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: The Modern Marketing Playbook
12:30 PM	Industry Experts: Real-Time Qualification at Scale
1:00 PM	Networking Lunch & Exhibitor Lounge: Delve Into Industry Conversations
2:00 PM	Case Studies: Prompt {R}evolution
2:30 PM	Closing Keynote: Building Blocks For Branding
3:00 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.



John Oxford

CMO 



Juan Silvera

Chief Marketing Officer 



Denise Milano Sprung

Chief Marketing Officer 



David Buzo

Chief Marketing Officer 



Jamie Horwitz

Chief Marketing Officer 



Aggie Tuxhorn

EVP Chief Brand Officer 



Med Yacoub

Marketing Director 



Bradley Erickson

SVP, Director,
Digital Marketing 



Leatrice Caldwell

Senior Vice President,
Outreach 



Helen Griffith

Vice President of
Marketing 



Gus Kroustalis

VP, Head of Digital
Marketing 



Stephen Rohrer

Head of Marketing
Data Enablement 

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.



Amy Holt

Senior Vice President,
Marketing



Jared Bellmund

Director,
Marketing & Sales



Polina Zueva

Fin-Fluencer



Jorie Walsdorf

Head of Marketing



Wendy Whitehurst

Sr. Manager,
Channel Marketing



Abbas Merchant

Executive Managing
Director- Marketing, Data,
AI



Lindsey Navia

Financial Marketing Thought Leader



Rick Lake

University Lecturer



Joseph Saad

VP of Americas,
B2B & E-Commerce



Dan Yerelian

Director of Product
Management



Vishal Maru

VP, Digital Consulting



Allison Wilson

SVP Marketing Strategy &
Innovation & FS Practice
Lead



7:45–8:45 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.



Abbas Merchant
Executive Managing Director
Prowess Consulting
Data and AI

9:00–9:30 AM

Keynote Presentation: The Power of Leading with Joy

Human-centered marketing that builds connections and drives organic growth
Harness the impact of emotionally intelligent, human-centered marketing to build deep connections and unlock sustainable organic growth.

- 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

9:30–10:00 AM

The AI Playbook for Turning Your Financial Services Website into a Revenue Engine

- Uncover key drivers, hidden friction points and missed revenue opportunities across high-stakes BFS funnels
- Benchmark your digital experience against top-performing banks, fintechs, and financial services companies
- Generate prioritized, evidence-backed recommendations with predicted business impact
- Rapidly translate insights into implementation-ready designs and optimization roadmaps



Vishal Maru
VP, Digital Consulting
iQuanti

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
Financial Marketing
Thought Leader



Juan Silvera
Chief Marketing Officer
AgFirst Farm Credit Bank



David Buzo
Chief Marketing Officer
Visionary Square
Moderator

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

Industry Expert: Cross-Sell is a Decision Problem

Using Audience Intelligence to Drive Smarter Growth

- Distinguish customer eligibility from true readiness
- Use behavioral and first-party signals to improve timing and prioritization
- Align channel strategy (digital + direct) to audience intent
- Move beyond static segmentation toward adaptive, insight-driven growth



Allison Wilson
SVP Marketing Strategy &
Innovation & FS Practice Lead
Amsive

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

12:45–1:15 AM

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.



Leatrice Caldwell
Senior Vice President,
Outreach
SECU



Bradley Erickson
SVP, Director, Digital
Marketing
First Citizens Bank



Jamie Horwitz
Chief Marketing Officer
**Community Capital
Management**



Abbas Merchant
Executive Managing
Director- Marketing
Prowess Consulting

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**.

2:15–2:30 PM

Exhibit Time

2:30–3:00 PM

Industry Expert: Decoding Ai Search

How LLMs See, Cite and Retrieve a Financial Services Brand

- What makes a financial brand retrievable and citable in AI systems
- How to design content that gets included in answers, not just ranked
- Where to build authority beyond your website to influence AI outcomes



Anirudh Singla
Co-Founder, CEO
Pepper Content

3:00–3:45 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: 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

3:45–4:15 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.

4:15–4:45 PM

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
Visionary Square



Helen Griffith
VP of Marketing
Sharonview Federal
Credit Union



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



Jorie Walsdorf
Head of Marketing
Clarity Pay
Moderator

4:45–5:15 PM

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

5:15–5:20 PM

End Of Day One Summary & Closing Remarks

Review the key solutions and takeaways from today’s sessions. Source a summary of action points to implement in your work. Discuss tomorrow’s highlights!

5:20 PM

Evening Reception: Enjoy Great Conversation, Music, & Networking

- **Relax and unwind** with tasty cocktails after a long day of learning.
- Don’t miss your chance to **win fun prizes** by scanning your badge at our exhibitor booths.
- Make dinner plans with your **new connections** and and explore the best of what Charlotte nightlife has to offer. Just be sure to set your alarm for day two!

7:45–8:45 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

Case Study: The Shifting Role Of Marketing Channels

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

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



Wendy Whitehurst
Sr. Manager,
Channel Marketing
Assetmark

10:00–10:45 AM

Case Study: 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.



Med Yacoub
Marketing Director
Tradesk

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.

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
- 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

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

12:30–1:00 PM

Industry Expert: Real-Time Qualification at Scale

Scale Volume and Quality with Real-Time Verification That Converts

- Convert qualified opportunities faster—and stop wasting time on the rest
- Embed your qualification requirements into the experience—not a post-process
- Scale conversion across 80M+ business decision-makers with a performance-based model



Joseph Saad
Vice President of Americas,
B2B & E-Commerce
Centerfield



Dan Yerelian
Director of Product
Management
Centerfield

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**.
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2:00–2:30 PM

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

2:30–3:00 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

3:00 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.

Digital Marketing for Financial Services Summit

CHARLOTTE

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.

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

Choose your pass type: in-person or virtual access

Secure your spot at DMFS Charlotte (May 7 - 8, 2026). Select **Full In-Person Access** for the complete onsite experience, or **Live Stream Access** to join key sessions from anywhere - both include **3-month on-demand replays**.

What’s included in your registration

Live Stream Access includes:	Full In-Person Access includes:
• Keynotes, panels, and live Q&A via stream • Virtual networking (message boards, roundtables, private chats) • Virtual Expo Hall access • Speaker content (presentations/white papers where available) • On-demand access for 3 months	• Full conference access (keynotes, panels, case studies, roundtables) • In-person networking with speakers, delegates, and sponsors • Breakfast, lunch, snacks + onsite cocktail reception • Expo Hall access • Speaker content (presentations/white papers where available) • On-demand access for 3 months

Pass Type	Rate	Deadline
Live Stream Access (Early Bird)	\$1,395	-
Full In-Person Access (Early Bird)	\$1,695	-
Group Rates (in-person)	\$1,695 (1 - 2) / \$1,595 (3) / \$1,395 (4+)	Register Together

Ready to register?

Register Now →

Contact:

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