



10th Annual

Digital Marketing *for*
Financial Services
Summit WEST

PAST ATTENDEE LIST

The largest and longest-running digital marketing
for financial services event in the North American West

May 21-22, 2025

Sample Past Attendee List

COMPANY	JOB TITLE
1st United Credit Union	SVP, Marketing & Communications
Actors Federal Credit Union	Director, Marketing
AllianceBernstein	VP, Design Director
Ally Financial	Chief Marketing & Public Relations Officer
Alterna Card Services	Director, Marketing
American Express Company	Senior Marketing Analyst, Digital Experience
American International Group	Director, Marketing
Ameritas	Chief Marketing Officer & SVP
Annexus	SVP, Marketing
Apple Bank	First Vice President, Marketing Director
Arrowhead Central Credit Union	VP, Marketing
Axos Bank	SVP, Head of Marketing
Bank of America	Managing Director, Global Transaction Services
Bank of New York Mellon	VP, Strategic Communications
Barksdale Federal Credit Union	VP, Marketing
Beacon Federal Credit Union	VP, Business Development & Marketing
Beneficial State Bank	SVP & Chief Marketing Officer
Berkshire Global Advisors	Head of Global Marketing
Berkshire Hathaway Inc.	Technical Product Owner
BMO Financial	Head of US Marketing Strategy & Integration
BNP Paribas	Vice President
BOK Financial	VP, Senior Marketing Manager

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COMPANY	JOB TITLE
Bond Financial Technologies Inc.	Head of Marketing
Cabrillo Credit Union	Vice President, Marketing
CAL Insurance & Associates	Vice President
Cambiar Investors	Director, Marketing
Capital Fund 1	VP, Marketing
Capital One	Managing Vice President & CIO, Financial Services Division
Capital One	Senior Vice President, Enterprise Consumer Product
Capital Wealth Advisors	Director, Marketing
Catalyst Private Wealth	Head of Client Services
Charles Schwab	Senior Marketing Manager
Chase	Vice President, Product Manager
Citi	Managing Director
Citibank	Senior Vice President
Citizens Bank	VP, Digital Media
City National Bank	SVP & Head of Marketing, Creative & Consumer Insights
Cliffwater	Head of Marketing
CommonWealth Central Credit Union	VP, Marketing
Community Bank of the Bay	SVP & Managing Director, Marketing
CSAA Insurance Group	Chief Marketing Officer
East West Bancorp, Inc.	VP, Media & Marketing Campaign Manager
Edward Jones	Digital Marketing Manager
Empire Life	VP & Chief Marketing Officer

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COMPANY	JOB TITLE
Experian	EVP, Chief Marketing & Revenue Officer
Farm Credit Services of America	Vice President, Digital
Fidelity Bank	SVP & Director, Marketing & Sales
Fidelity Investments	Vice President
First Command Financial Services	Vice President, Strategic Marketing
First Community Credit Union	Director, Marketing
First Horizon Bank	EVP & Chief Marketing Officer
First Merchants	VP & Senior Director, Digital Marketing
First Republic Bank	Director, Collaboration Technology & Marketing
First Republic Bank	Head of Acquisition Marketing
Franklin Templeton Investments	Director, Content Marketing
Fremont Bank	Vice President, Marketing & Client Experience
FundX Investment Group	Managing Director
GM Financial	AVP, Multichannel Marketing
Golden Oak Lending	Director, Marketing
GreatAmerica Financial Services	VP, Corporate Marketing
GreenPath Financial Wellness	Chief Marketing Officer
Heritage Southeast Bank	Director, Marketing
Hippo Insurance Services	VP, Marketing
Investors Group Securities	Director, Field Marketing
J.P. Morgan	SVP, Growth
J.P. Morgan	VP, Martech Digital Solutions

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COMPANY	JOB TITLE
JMMB Group Jamaica	Chief Marketing Officer
John Hancock	Global Head of Social Media Marketing
Lord, Abbett & Co.	Head of Content & Campaign Strategy
M&T Bank	VP, Retirement Services Marketing
MassMutual	Director, Marketing
Mastercard	VP, Global Loyalty Product Management & New Product Development
Mastercard	VP, Targeting Analytics
Matthews Asia	Vice President, Digital Marketing
Mechanics Bank	Senior Vice President & Director, Marketing & Communication
Meriwest Mortgage Company LLC	Vice President, Marketing
Morgan Stanley	Global Head of Research Marketing
Mortgage Solutions Financial	Chief Marketing Officer
Munich Re Group	Digital Product & Marketing Manager
Mutual Credit Union	VP, Marketing
Nationwide Building Society	VP, Marketing (Individual Products & Solutions)
NEXT Insurance	Head of Partnership Development
Northwestern Mutual	Director, Marketing
Pacific Coast Bankers' Bank	SVP, Marketing
Parnassus Investments	Director, Channel Marketing
Patelco Credit Union	Vice President, Marketing
Penn Mutual Life Insurance Company	Director, Field Marketing & Communications
PIMCO	Client Marketing Manager

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COMPANY	JOB TITLE
Plumas Bank	VP, Client Engagement
Prudential Financial	VP, Marketing & Digital
Prudential Financial	Marketing Director
Pzena Investment Management	Director, Marketing Operations
Rocket Mortgage	Director, Product Marketing
Rockland Trust	Director, Digital Strategy & eCommerce
San Francisco Federal Credit Union	Head of Marketing
Santa Clara County Federal Credit Union	VP, Marketing
Santander Bank	Chief Marketing Officer
Selective Insurance	Head of Digital Marketing
SF Fire Credit Union	Chief Marketing Officer
Silicon Valley Bank	Director, Integrated Marketing Strategy
SoFi	Senior Director, Marketing Data Science
Spokane Teachers Credit Union	Director, Brand Marketing
State Street Global Advisors	VP & Global Head of Social Media
Synovus Financial	Director, Digital Marketing
TAB Bank	AVP, Marketing
Tangerine Bank	Chief Marketing Officer
TD Bank Financial Group	Head of Content & Digital Platform
Teachers Insurance and Annuity Association of America	Senior Director, Marketing
Texas Trust Credit Union	Vice President, Marketing
The Haverford Trust Company	Vice President & Director, Marketing

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COMPANY
The Police Credit Union
Tiedemann Advisors
Tigress Financial Partners
Transamerica
Truist Bank
U.S. Bank
U.S. Bank
U.S. Bank Wealth Management
UBS Financial Services
UFG Insurance
Union Bank
US Capital Global
Vanguard Group
Visa
Vocality Community Credit Union
Wells Fargo
Wells Fargo
Woodruff Sawyer

JOB TITLE
AVP, Digital Marketing
Head of US Marketing
Senior Managing Director & Head of Global Private Funds
Director, Brand & Digital
SVP, eCommerce Marketing
Senior Vice President
VP, Marketing
VP & Manager, Digital Marketing
Social Media Specialist
AVP, Surety Marketing Manager
AVP, Email Marketing
Senior Vice President
Head of Institutional Digital Marketing
Product Manager
Director, Marketing
Senior Vice President, Strategy & Planning
VP, Digital Marketing
VP, Marketing & Sales Operations

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Digital Marketing for Financial Services Summit WEST

We have a limited number of speaking opportunities and they sell out quickly! Connect with our community of intent-based buyers ready to invest in your solution.



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Darren Haughian
Sponsorship Director

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

Upcoming Events in this Market Segment

15th Annual

Digital Marketing for Financial Services Summit CANADA

Spring 2025

7th Annual

Digital Marketing for Financial Services Summit MIDWEST

Fall 2025

12th Annual

Digital Marketing for Financial Services Summit NEW YORK

Fall 2025