

10th Annual

Digital Marketing *for* Financial Services Summit **WEST**

The only event series designed for financial services leaders overseeing digital marketing strategy, operations, and technology.

May 21 & 22, 2025 | Grand Hyatt, San Francisco

Bridge the gap between marketing strategy and operations to drive growth and differentiation

Expert speakers include:



Vanessa Guajardo
Chief Marketing Officer
& Chief of Staff
US Capital Global



Riham El-Lakany
Former Chief Marketing
Officer
BJC Healthcare,
Freddie Mac and Marsh



Emily Childers
Chief Marketing
Officer
Earnest



Jeff Gardner
Executive Vice President,
Sales & Marketing
Mutual of Enumclaw



Anne Gherini
Chief Marketing Officer
Sierra Ventures

Welcome, Financial Services Marketing Leaders!

Dear Colleagues,

Welcome to the 10th Annual West edition of the DMFS Summit, which brings together the most innovative, engaged and influential financial services leaders driving customer growth.

The Summit is designed to support marketing, digital and experience leaders across a wide range of financial services with strategic guidance, practical tips, effective tools and innovative technology, delivered by the brightest minds in the industry. We have curated a two-day agenda, packed with case studies, workshops, panel discussions and roundtables that will provide you with an actionable plan on how to accelerate your marketing transformation, drive growth through marketing and technology, unlock the full potential of your content strategy, utilised tools for AI-enabled personalisation, utilize marketing insight and analytics, optimize creative processes with GenAI technologies, execute mix media optimization for high impact campaigns and much more.

Join us to source best practices from market-leading brands like Mastercard, Ameritas, JP Morgan Chase & CO, US Capital Global, Fremont Bank, Equity Multiple and more.

Make lasting business connections that will help you excel in your transformation journey.

We look forward to welcoming you into the DMFS community and hosting you in May 2025!



Taya Prokopenko
Head of Content, Digital Marketing for Financial Services
Strategy Institute
Taya@strategyinstitute.com

“The wealth of experience at the conference is amazing. If you are in the Digital Marketing Field for Financial services. This is one of the must see, must attend conferences.”

Macquarie Banking and Financial Services



Why Attend?

- 1 Benchmark and create a robust business strategy** that will result in sustainable customer growth
- 2 Maximize ROI** through expertise-sharing on how to leverage the latest innovative technologies and practices
- 3 Set up an effective organization**, empowered by data, tools and the right talent to achieve customer primacy
- 4 Gain actionable insights** on how to stand out and grow in a crowded market
- 5 Build relationships** with the most engaged and influential thought leaders in the industry
- 6 Discover potential partners** that will help you take your business to the next level



Agenda at a Glance

The DMFS West Summit is the 10th edition of North America's most exclusive and dedicated digital marketing and growth event series designed for the financial services industry. Join us to discuss best practices on:

- 1 Empowering your business to make data-driven decisions to unlock the full potential of your marketing investments**
- 2 Driving marketing effectiveness, customer value, and loyalty with AI-enabled personalized communication at scale**
- 3 Enabling an agile marketing organization and structuring empowered teams to respond to real-time business and consumer needs**
- 4 Unlocking the value of marketing to drive customer experience and growth through structural transformation**
- 5 Unlocking exponential growth with limited resources through reducing marketing waste by implementing innovative, high-impact approaches**
- 6 Transforming your marketing strategy into a powerful enabler of sales and business growth.**
- 7 Enabling sales and business development teams through content, automation and AI-powered tools**



NEW WORKSHOPS



AGILE MARKETING STRATEGY

Enabling Capacity Scaling Through an Agile Marketing Setup.



AI TOOLS FOR EFFICIENT AND EFFECTIVE MARKETING

Leveraging AI to Enhance Marketing Outcomes Without Stretching Your Resources



META & LINKEDIN STRATEGY

Optimizing Social Media ROI with Limited Resources



NEW ROUNDTABLES INCLUDE



THE SCIENCE OF MARKETING IMPACT

Connecting Marketing Efforts to Measurable Business Results



BEYOND COOKIE-CUTTER COMMUNITY PROGRAMS

Creating Unique Offerings that Enrich Communities and Differentiate Your Brand



AI TOOLS IN MARKETING

Unlocking the Full Potential of Your Marketing Efforts



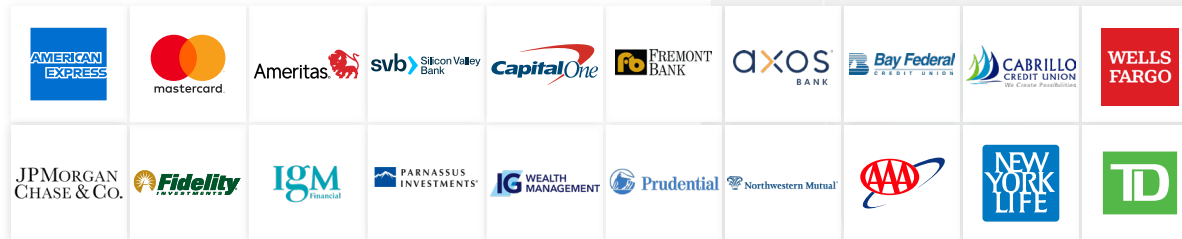
DOING MORE WITH LESS

Leveraging Existing Resources to Attract More Customers Today.

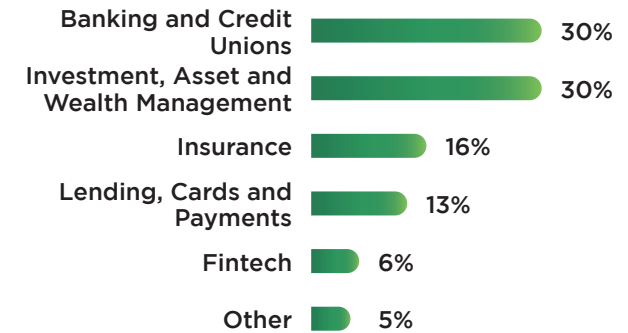


Who Attends

Network with senior peers from North America's top financial brands:



Market Segment



Marketing

C-Suite/SVP/VP/Director/
Manager of:

Marketing Operations, Marketing Strategy, Digital Marketing, Customer/Client/Consumer Engagement, Social Media, Content, Brand, Media, Communications, Creative, Advertisement, Product Marketing, SEO, SEM, Growth



Customer Experience

C-Suite/SVP/VP/Director/
Manager of:

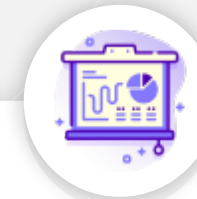
Customer/Client Experience, Customer Insight & Analytics, Customer Journey



Digital

C-Suite/SVP/VP/Director/
Manager of:

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



Data Analytics & Insights

C-Suite/SVP/VP/Director/
Manager of:

Marketing Analytics, Customer Insight



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Meet the Expert Speakers

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Riham El-Lakany
Former Chief Marketing Officer at
BJC Healthcare, Freddie Mac and Marsh



Brent Korte
Chief Marketing Officer & Senior Vice President
Ameritas



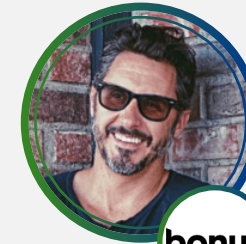
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Eddie Herda
Chief Marketing Officer
Bonus Homes



Donna Doleman Dickerson
Chief Marketing Officer
University of Michigan Credit Union



Ryan Steingard
Former Chief Marketing Officer
Upwardli



Lisa Terk
Senior Vice President
US Capital Global



Nidhi Daga
Senior Vice President, Growth & Customer Experience
JPMorgan Chase & Co



Jeff Gardner
Executive Vice President, Sales & Marketing
Mutual of Enumclaw



Scott Spidell
Vice President, Strategic Marketing
First Command Financial Services

WELCOME

SPEAKERS

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Erin McReynolds
Vice President,
Marketing & Client
Experience
Fremont Bank



Stacy Kendall
Senior Vice President,
Marketing & Community
Impact
Plumas Bank



John Huntinghouse
Vice President,
Marketing
TAB Bank



Sarah Tsunehara
Vice President of Product
Assembled Brands



Ernest Kuo
Associate Vice President,
Channel Marketing
The Police Credit Union



Jake Engel
Assistant Vice President,
Brand Communications
& Strategy
**Financial Center & Ball
State Financial**



Polis Pavlidis
Senior Director,
Marketing Analytics &
Data Science
Visa



Dave Doran
Director, Digital
Marketing Programs
Franklin Templeton



Scott Graham
Operating Partner,
Marketing & Growth
Diversis Capital



Dorothy Friedrich
Director of Marketing
**Jensen Investment
Management**



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Meet the DMFS Advisory Board



Donna Doleman Dickerson
Chief Marketing Officer
University of Michigan Credit Union



Andy O'Rourke
Chief Marketing Officer
Direxion



Donna Jermer
Executive Vice President,
Chief Marketing Officer
Insuritas



John Renz
Vice President, Head of Creative, US Businesses
Prudential Financial



Mitch Rose
Executive Director,
Digital Strategy - Content
J.P. Morgan



Kristi Daraban
Associate Vice President,
Marketing - Social Media
Nationwide



Erin Wilson
Vice President,
Marketing
HomeEquity Bank



Scott Spidell
Vice President, Strategic Marketing
First Command Financial Services



Marco Carrucci
Vice President,
Marketing
TradeStation



Dan Moshkovich
Vice President,
Marketing
Chargeflow



Stephen Diorio
Managing Director
Revenue Enablement Institute



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REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

7:30 AM

WELCOME FROM STRATEGY INSTITUTE

8:40 AM

OPENING REMARKS FROM THE CHAIRPERSON

8:45 AM

Riham El-Lakany

Former Chief Marketing Officer

BJC Healthcare, Freddie Mac and Marsh

KEYNOTE PRESENTATION: MARKETING TRANSFORMATION

9:00 AM

Unlocking the Value of Marketing to Drive Customer Experience and Growth Through Structural Transformation

Ensure your marketing organization remains relevant and valuable amid waves of disruption. Walk away with an action plan on:

- Identifying and harnessing the strengths of your existing marketing function.
- Creating bespoke organizational structures that reflect your marketing strategy and business model.
- Implementing digital and measurement initiatives despite imperfect enterprise data.
- Promoting cross-functional problem-solving and collaboration.

Achieve long-term resilience, transformation, and growth through an integrated and omnichannel go-to-market strategy that optimizes marketing's full potential.

KEYNOTE PANEL DISCUSSION: ORGANIZATIONAL CHANGE MANAGEMENT

9:30 AM

Transforming Marketing into a Growth Engine Through Agile Teams, Cultural Shifts, and Metrics That Matter

Lead an organizational transformation that positions marketing as a critical growth driver. This session will explore how to navigate leadership transitions, embrace collaborative methodologies, and build agile teams that deliver measurable impact. You will walk away with actionable strategies on:

- Shifting from traditional to collaborative management to foster innovation and align teams with business goals.
- Implementing agile marketing practices and data-driven decision-making to drive impactful results.
- Redefining success through metrics and cultivating data-driven decision-making.

Empower your marketing team to lead growth, foster collaboration, and drive meaningful change across your organization.

Donna Doleman Dickerson

Chief Marketing Officer

University of Michigan Credit Union

UNIVERSITY OF MICHIGAN
CREDIT UNION

Carmen Zagazeta

Director, Digital Experience, Design & Content

Blue Shield of California

blue
california

Mary Griffin

Senior Director, Growth Marketing

Silicon Valley Bank

svb Silicon Valley
Bank

Led by Riham El-Lakany

Former Chief Marketing Officer

BJC Healthcare, Freddie Mac and Marsh



SPEED NETWORKING

10:15 AM

INDUSTRY EXPERT PRESENTATION: ACCELERATE YOUR TIME TO VALUE WITH COMPOSABLE MARTECH

10:30 AM

Getting A Head Start on Your Digital Transformation

In today's rapidly evolving digital landscape, embracing composable MarTech is key to staying ahead. Join us for a session where we'll dive into how you can accelerate your time to value and get a head start on your digital transformation journey. You'll walk away with tips on how to:

Enhance your digital transformation journey, achieving faster time to value and position yourself for long-term success in the dynamic digital marketplace.

Dave Stawinski
Vice President, Digital
Xcentium

XCENTIUM

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

11:00 AM

11:30 AM

TRACK A: DIGITAL INNOVATION & GROWTH

INDUSTRY EXPERT PRESENTATION: THE DIGITAL LEAP FORWARD

Personalizing Financial Video Content at Scale With AI

Elevate your marketing strategy by harnessing AI-driven solutions to personalize financial video content without compromising compliance or data privacy. In this session, Kaltura will showcase how to transform existing media into tailored, engaging experiences that resonate with diverse audiences while meeting strict regulatory standards. You will walk away with practical strategies on:

- Delivering highly targeted, data-secure video content to boost engagement and trust.
- Repurposing existing media assets to maximize impact and relevance for multiple customer segments.

TRACK B: DOING MORE WITH LESS

INDUSTRY EXPERT PRESENTATION: CONTENT STRATEGY 2.0

Unlocking the Full Potential of Your Content Strategy

Elevate your brand's visibility and effectively engage with your audience in a rapidly evolving digital landscape. Master the success factors to:

- Uncover hidden opportunities within your existing content strategy.
- Explore new channels and techniques to amplify your reach.
- Adapt to evolving content consumption trends across platforms and devices.

Perfect your content strategy to stay ahead of audience expectations and drive meaningful engagement.



12:00 PM

TRACK A: DIGITAL INNOVATION & GROWTH

CASE STUDY: HUMANIZING AI-DRIVEN COMMUNICATIONS AT SCALE

Reinventing Customer Engagement with Generative AI

Innovate your marketing by leveraging generative AI to craft effective customer communication in a way that strengthens customer trust. You will walk away with actionable insights on:

- Integrating AI-driven writing tools to streamline and humanize vital customer communications.
- Balancing automation with brand integrity and regulatory compliance in a traditionally risk-averse sector.
- Building an internal culture that embraces AI at scale while maintaining personal, empathetic interactions.

Discover how an iconic insurance brand applies GenAI to elevate customer satisfaction and push the boundaries of digital transformation.

TRACK B: DOING MORE WITH LESS

CASE STUDY: BUILDING AN AWARD-WINNING MARKETING TEAM

Giant Slayers: Unlocking 10x Growth with Limited Resources

Learn from TAB Bank's journey to record-breaking revenue through the revolution of its marketing department. Increase ROI and reduce marketing waste through innovative, high-impact methods for achieving exponential growth despite having constrained resources. Take back to your office strategies to:

- Leverage unique insights, streamline operations, and capitalize on niche markets.
- Create and structure a scalable growth engine for teams of any size.
- Build trust within your organization to secure additional resources as you grow.

Reduce marketing waste by implementing innovative, high-impact approaches to achieve exponential growth despite limited resources.

John Huntinghouse
Vice President, Marketing
TAB Bank



12:30 PM

TRACK A: DIGITAL INNOVATION & GROWTH

PANEL DISCUSSION: PERSONALIZATION AND CUSTOMER EXPERIENCE TRANSFORMATION

Strategic Approaches to Redefining Personalized Engagement in Financial Services

Drive deeper connections with your customers by reimagining personalization and transforming the customer experience through Generative AI-driven strategic innovation. In this session, industry leaders will discuss the frameworks and strategic imperatives necessary to elevate customer engagement in an increasingly digital and competitive landscape. Source your plan of action by:

- Designing a personalization strategy that aligns with customer expectations and business goals.
- Leveraging data and technology to create seamless, personalized customer journeys.
- Building cross-functional collaboration to ensure a consistent and impactful customer experience.

Nidhi Daga
Vice President, Growth
JPMorgan Chase & Co

JPMORGAN
CHASE & CO.

Will McGinnis
Director of Sales
fullthrottle.ai

fullthrottle.ai®

Led by:
Erin McReynolds
Vice President, Marketing & Client Experience
Fremont Bank

FREMONT
BANK

TRACK B: DOING MORE WITH LESS

PANEL DISCUSSION: DOING MORE WITH LESS

Building Brands and Maximizing Impact with Strategic Resource Allocation

Deliver impactful marketing campaigns with lean teams and constrained budgets. This session brings together marketing leaders to share proven strategies for building a successful marketing function, leveraging external partners, and launching effective campaigns that drive results. Create a roadmap to:

- Create strong marketing foundations, including brand guides, content strategies, and website optimization.
- Build team skills and leverage external partners to expand your capabilities.
- Design and execute high-impact multimedia campaigns on limited budgets.

Achieve impactful marketing results by optimizing resources and building a resilient, effective team.

Stacy Kendall
Vice President, Marketing & Community Impact
Plumas Bank

PLUMAS
BANK

Ernest Kuo
Associate Vice President, Channel Marketing
The Police Credit Union

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POLICE
CREDIT UNION
Serving Law Enforcement Since 1983

Kathryn Farthing
Director, Growth Marketing
MaxMyInterest

MAX
your best interest.

Scott Graham
Operating Partner, Marketing & Growth
Diversis Capital

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NETWORKING LUNCH & EXHIBITOR LOUNGE VISITS

1:15 PM



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2:15 PM

TRACK A: DIGITAL INNOVATION & GROWTH

CASE STUDY: THE DIGITAL TRANSFORMATION JOURNEY

Integrating Digital Across the Entire Marketing and Sales Lifecycle to Support Growth

Align people, processes, and technology with business goals while staying nimble in a fast-changing landscape. You will walk away with actionable strategies on:

- Introducing and optimizing AI tools to enhance customer interactions.
- Conducting digital readiness audits, building the right team, and selecting technologies that align with your goals.
- Building out analytics capabilities to enhance decision-making and maximize ROI.

Empower your organization to embrace digital transformation and achieve strategic alignment across all channels.

Jeff Gardner

Executive Vice President, Sales & Marketing
Mutual of Enumclaw



Keith Gerr

Director, Digital Channel Strategy
Mutual of Enumclaw



TRACK B: DOING MORE WITH LESS

CASE STUDY: STRATEGIC MARKETING FOR B2B SUCCESS

Driving Sustainable Growth: Balancing Resources and Creativity

Learn how Assembled Brands, an asset-backed lender for consumer product companies, has successfully built a brand and marketing presence with a lean team and a measured approach. This case study will explore how to navigate long sales cycles, balance digital and traditional marketing strategies, and stand out in a competitive space. Achieve a step-by-step action plan to:

- Structure a brand and leverage digital marketing content to engage brokers, bankers, and business clients.
- Balance internal resources and third-party partnerships to maximize efficiency and output.
- Track meaningful metrics and create marketing strategies tailored to long lead times and niche B2B audiences.

Amplify your marketing strategies to align with your business model, scale responsibly, and deliver lasting impact.

Sarah Tsunehara

Vice President of Marketing
Assembled Brands



2:45 PM

WORKSHOP 1: AGILE MARKETING STRATEGY

OR

WORKSHOP 2: AI TOOLS FOR EFFICIENT AND EFFECTIVE MARKETING

OR

WORKSHOP 3: META & LINKEDIN STRATEGY

Enabling Capacity Scaling Through an Agile Marketing Setup

Become a strategic partner within your business by implementing an adaptable agile framework for marketing operations. Develop a blueprint to:

- Develop and curate an agile marketing team.
- Transition from waterfall to agile and understand “being agile” vs. “doing agile.”
- Hold more impactful conversations at the top level, powered by cost-value metrics.

Achieve unprecedented business impact by enabling marketing teams to pivot quickly and respond to real-time needs.

Led by:

Scott Spidell

Vice President, Strategic Marketing
First Command Financial Services



Leveraging AI to Enhance Marketing Outcomes Without Stretching Your Resources

Explore high-impact use cases to amplify results, streamline processes and improve efficiency and creativity. Adopt best practices to:

- Intelligently automating key marketing tasks, from content creation to campaign optimization.
- Selecting the most effective AI tools for your organization’s goals and challenges.
- Using AI to improve personalization, customer engagement, and data-driven decision-making.

Empower your marketing team to achieve more with less by making AI tools work smarter for your business.

Led by:

Ryan Steingard

Former Chief Marketing Officer
Upwardli



Optimizing Social Media ROI with Limited Resources

Unlock the potential of Meta and LinkedIn to grow your brand presence and achieve impactful results, even with a limited budget. This session will provide actionable strategies for leveraging free tools, creating engaging content, and streamlining your social media approach. You will walk away with actionable insights on:

- Effectively utilizing free tools and analytics to optimize your social media strategy.
- Identifying and prioritizing high-impact activities to maximize ROI on Meta and LinkedIn.
- Streamlining content planning with a structured calendar, automation tools, and flexible workflows.

Develop a sustainable and efficient approach to social media that drives results without overextending your resources.

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

3:30 PM



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INDUSTRY EXPERT PRESENTATION: THE FUTURE OF FINANCIAL SERVICES MARKETING

4:00 PM

Achieving Harmony in Personalization, Trust and Compliance

Elevate your financial marketing approach by infusing the emotional promise of your brand into every digital interaction. This session will reveal how to leverage AI-driven personalization, real-time engagement, and compliance-first strategies to transform transactional touchpoints into meaningful experiences. You will walk away with practical insights on:

Create a unified, empathetic marketing framework that resonates with modern consumers while honoring the strict demands of the financial services landscape.

Justin Orgel

Senior Director, Strategic Services

Marigold



CASE STUDY: MARKETING AS SALES ENABLEMENT

4:30 PM

Driving Rapid Business Growth Through Marketing and Sales Collaboration

Accelerate business growth and engagement through marketing and sales alignment, as demonstrated by an award-winning investment bank. This session will highlight innovative approaches to marketing as a driver for sales enablement, focusing on data-driven strategies, social media campaigns, and multichannel content creation. Walk away with an action plan on:

- Structuring collaboration between marketing and sales to target and engage the right audiences.
- Leveraging digital marketing techniques, multimedia content, and fintech tools to secure leads and increase market share.
- Building high-impact campaigns to showcase deals, elevate client profiles, and drive investment opportunities.

Vanessa Guajardo

Chief Marketing Officer & Chief of Staff

US Capital Global



Lisa Terk

Senior Vice President

US Capital Global



END OF DAY ONE SUMMARY & CLOSING REMARKS

5:00 PM

Riham El-Lakany

Former Chief Marketing Officer

BJC Healthcare, Freddie Mac and Marsh

EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC, & NETWORKING

5:05 PM



DAY TWO REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

8:00 AM

DAY TWO OPENING REMARKS FROM THE CHAIRPERSON

8:50 AM

Riham El-Lakany

Former Chief Marketing Officer

BJC Healthcare, Freddie Mac and Marsh

KEYNOTE PRESENTATION: REDEFINING GROWTH IN THE DIGITAL ERA

9:00 AM

Leveraging Marketing and Technology to Drive Enterprise-Wide Transformation

Explore how to cultivate a transformative growth philosophy by aligning marketing innovation with enterprise-wide objectives. Drawing from his experience as the first-ever CMO of Ameritas, Brent Korte will share strategies for leveraging digital transformation and cutting-edge technology to deliver measurable business results. Take back to your office strategies to:

- Develop a centralized marketing framework that integrates data science and customer insights to fuel revenue growth.
- Create a digital transformation roadmap to drive innovation and build strategic enterprise capabilities.
- Align branding, ESG, and DEI initiatives with corporate growth agendas to strengthen customer engagement.

Enrich marketing leadership to drive growth, innovation, and measurable success across your organization.

Brent Korte

Chief Marketing Officer & Senior Vice President

Ameritas

Ameritas 

INDUSTRY EXPERT PRESENTATION: AI-POWERED SEARCH

9:30 AM

Adapting for Greater Brand Discovery in an Evolving Landscape

Explore how AI is reshaping the way consumers discover brands online. Source your plan of action by:

- Adapting to algorithm changes.
- Optimizing your search presence.
- Leveraging AI-driven insights.

Increase your brand's visibility and discovery in an increasingly competitive search environment.



10:00 AM

PANEL DISCUSSION: AI-DRIVEN CHANGE MANAGEMENT

Driving Your Organization Towards Rapid and Responsible Exploration of AI Capabilities for Process Optimization, Scaling, and Customer Journey Improvements

Discover how early adopters discern the most impactful business use cases, separating reality from hype and swiftly involving relevant internal stakeholders. Adopt best practices to:

- Navigate a use case from pilot setup to execution stage.
- Address privacy and bias concerns within internal teams and external customers.
- Identify opportunities to upskill your teams with AI-powered tools.

Optimize your AI capabilities to unlock new levels of efficiency, innovation, and competitive advantage in your marketing strategies.

Brent Korte

Chief Marketing Officer & Senior Vice President

Ameritas



Anne Gherini

Chief Marketing Officer

Sierra Ventures



Dorothy Friedrich

Director of Marketing

Jensen Investment Management



Led by Riham El-Lakany

Former Chief Marketing Officer

BJC Healthcare, Freddie Mac and Marsh

10:45 AM

REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS



11:30 AM

ROUNDTABLE DISCUSSIONS

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: THE SCIENCE OF MARKETING IMPACT: Connecting Marketing Efforts to Measurable Business Results

Led by: **Polis Pavlidis**, Senior Director, Marketing Analytics & Data Science, **Visa**



B: CREATIVITY IN MODERN FINANCIAL BRANDS: Discovering Opportunities for Creativity and Creative Collaboration to Make Financial Marketing Fun.

C: MARKETING BUDGET PLANNING : Benchmarking Marketing Investment in 2025

Led by: **Mary Griffin**, Senior Director, Growth Marketing, **Silicon Valley Bank**



D: DOING MORE WITH LESS: Driving Impact with Lean Teams

Led by: **Kathryn Farthing**, Director, Growth Marketing, **MaxMyInterest**



E: AI TOOLS IN MARKETING: Unlocking the Full Potential of Your Marketing Efforts

F: MARKETING BUDGET PLANNING: Positioning Your Organization to Uniquely Enrich Communities and Differentiate Your Brand

Led by: **Stacy Kendall**, Senior Vice President of Marketing, **Plumas Bank**



INDUSTRY EXPERT PRESENTATION

12:00 PM

ENABLING PERSONALIZATION : Enhancing the User Experience Through a Robust Personalization Strategy

Implement personalization capabilities to deliver unique experiences for your clients and prospects at scale. This session provides insights to help you develop a roadmap for personalization within your organization. Take back to your office strategies to:

- Assess the impact on your business setup and drive effective change management across multiple lines of business.
- Use existing data in a more compelling way to enhance personalization.
- Optimize the placement of tools and data in collaboration with IT to maximize their capabilities.

Master a roadmap for increasing personalization maturity in your organization to improve your digital experience.

FIRESIDE CHAT: GO-TO-MARKET STRATEGY: Building Customer Trust and Confidence in New Financial Products and Services

12:30 AM

Connect with the right consumers and drive adoption through a robust go-to-market strategy, partnerships, targeted marketing and consumer education. Key insights from this fireside chat will include:

- Crafting a go-to-market strategy that addresses financial complexity while earning consumer confidence.
- Working with a wide range of partners and targeted campaigns to connect with the right audience.
- Overcoming the challenge of building awareness and trust for a new product in select markets.

Bring a new or complex financial product to market with a strategic approach to build trust, educate customers and connect with the right audience.

Eddie Herda
Chief Marketing Officer
Bonus Homes

bonus
HOMES

Led by Riham El-Lakany
Former Chief Marketing Officer
BJC Healthcare, Freddie Mac and Marsh

NETWORKING LUNCH

1:00 PM



INDUSTRY EXPERT PRESENTATION: AI-ENHANCED ENGAGEMENT

2:15 PM

Scaling Personalization with Intelligent Digital Experiences

Scale engaging digital experiences effectively through the right strategy and tools, while maintaining compliance and delivering meaningful connections. Future-proof your marketing efforts through practical tips on:

- Leveraging interactive content, webinars, and virtual events that connect with your audience and strengthen relationships.
- Scaling video and content creation with AI to maximize impact.
- Harnessing first-party data to optimize campaigns, improve content performance, and drive ROI.

Unlock the power of intelligent engagement to build stronger customer connections, improve marketing efficiency, and achieve scalable growth.

Mark Bornstein

Vice President, Marketing & Chief Evangelist

ON24



PANEL DISCUSSION: PERFORMANCE MARKETING STRATEGIES

2:45 PM

Maximizing Impact Through Smarter Budget Allocation and Media Mix Optimization

Develop precision and a deep understanding of how to allocate resources effectively to drive measurable results. This session will delve into the science behind budget allocation, media mix success, and marketing attribution to ensure your campaigns reach the right audience at the right time. You will walk away with actionable insights on:

- Evaluating and optimizing your media mix to maximize ROI and customer engagement.
- Leveraging advanced attribution techniques to measure the true impact of your campaigns.
- Aligning performance marketing strategies with broader organizational goals to achieve scalable success.

Harness performance marketing to create high-impact campaigns that deliver measurable business growth.

Emily Childers

Chief Marketing Officer

Earnest



Led by Riham El-Lakany

Former Chief Marketing Officer

BJC Healthcare, Freddie Mac and Marsh



PRESENTATION: HUMAN-CENTRIC CONTENT

3:15 PM

How to Unmute the Human Voices Behind Your Brand

“You’re on mute.” We’ve all heard it too many times, but for financial marketers, it’s more than a Zoom issue — it’s a brand issue. Rigid brand control and compliance fears often “mute” your most authentic and impactful storytellers: your people. But here’s the truth: your team’s voices can confidently amplify your brand and stay compliant at the same time. This session will provide tangible advice to:

- Build a digital brand fueled by human-centric content.
- Empower your team to confidently share branded, compliant content.
- Equip your executive team with resources to elevate their digital personal brands to strengthen your organization's reputation.

Encourage your team to bring their human voices to the forefront of your brand's story and get ready to drop the mic.

Jake Engel

Assistant Vice President, Brand Communications & Strategy

Financial Center & Ball State Financial



CLOSING REMARKS & END OF SUMMIT

3:45 PM



Sponsorship Opportunities

Support North America's largest and scaling financial brands on their marketing transformation journey with your **technology solutions, strategic expertise and implementation experience.**

Showcase your brand and thought-leadership at the flagship event of the largest and longest-serving portfolio of digital marketing for financial services Summits in North America for more than 14 years.

Depending on your needs, the sponsorship packages can include:

- ✓ Speaking opportunities to demonstrate your brand's expertise
- ✓ Closed-door curated sessions for a selected group of participants
- ✓ Exhibition booths to facilitate networking and product demos

What our Sponsors have to say:

"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 – Past Sponsor

For more information to discuss the different ways to get involved for your brand, please contact:



Darren Haughian
Sponsorship Director
Strategy Institute

Call: 1-866-298-9343 x 276

Email: darren@strategyinstitute.com

Other upcoming events in the DMFS series:

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



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10th Annual

Digital Marketing *for* Financial Services Summit **WEST**

May 21 & 22, 2025
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BOOK YOUR DELEGATE PASS NOW

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 2 In Person (April 25, 2025)	\$1,395 USD
Regular Price	\$1,595 USD

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 away 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 2 Virtual (April 25, 2025)	\$1,195 USD
Regular Price	\$1,395 USD



GROUP RATES

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



Sam Caskey
Delegate Sales Executive
sam.caskey@strategyinstitute.com

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VENUE

We have secured a number of rooms at the Summit venue at a discounted rate for our participants.

Address: 345 Stockton St, San Francisco, CA 94108, United States

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