

## AGENDA FOR THE FIRESIDE FORUMS

SUNDAY, JANUARY 11

**LEADERSHIP**

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| 7:45pm | 8:00pm | <p><i>CHAMPION FORUM</i><br/> <b>“Taking Home The Gold”</b><br/> <i>FCS Board Director Etienne Katz will interview Olympic gold medalist Donna Weinbrecht (Moguls, 1992 Albertville, France).</i></p>  |
| 8:00pm | 8:15pm | <p><i>WELCOME SESSION</i><br/> <b>“Game Time”</b><br/> <i>FCS CEO Kevin Windorf will lead an interactive presentation of the Summit’s itinerary.</i></p>   |
| 8:15pm | 8:45pm | <p><i>CONTENT FORUM 1 – presented by Reuters</i><br/> <b>“Humanizing Finance: Building Trust and Emotional Connection in a Digital-First World”</b><br/> <i>Lauren Young, Editor, Digital Special Projects, Reuters will interview:</i></p> <ul style="list-style-type: none"> <li>• <b>Richard Parkinson, Chief Brand &amp; Marketing Officer, Prudential Financial</b></li> </ul>  |
| 8:45pm | 9:15pm | <p><i>CONTENT FORUM 2 – presented by Level Agency</i><br/> <b>“Bridging the Gap: How Financial Services Leaders Turn Marketing Data into C-Suite Decisions”</b><br/> <i>Roundtable discussion featuring:</i></p> <ul style="list-style-type: none"> <li>• <b>Patrick Van Gorder, President, Head of Partnerships, Level Agency</b></li> <li>• <b>Sheri Gilchrist, Head of Marketing, Communications &amp; Customer Analytics, Fidelity Investments</b></li> <li>• <b>Sheryl Markov, EVP, Head of Digital Marketing, Demand Generation and Data Analytics, Northern Trust</b></li> <li>• <b>Katrina Noelle, President, KNow Research</b></li> </ul> |
| 9:15pm | 9:45pm | <p><i>AWARD FORUM 3: FCS LEADERSHIP AWARD PRESENTATION – presented by Life60 Ads featuring Nativo</i><br/> <b>Victor DeLeo, Regional VP, Life360 Ads, will interview Jennie Platt, CMO, TD Bank U.S., the winner of the 2025 FCS Leadership Award (honoring Jamie E. DePeau).</b></p>  |

**MONDAY, JANUARY 12** *BRAND REPUTATION*

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| <b>7:30am</b> | <b>8:15am</b> | <i>BREAKFAST FOR FORUM GUESTS</i> – sponsored by <b>Getty Images</b>   |
| <b>8:15am</b> | <b>8:30am</b> | <i>MORNING KICK-OFF</i><br><b>“Industry Pulse Check”</b> : FCS CEO <b>Kevin Windorf</b> will present the top financial marketing stories of 2025.  |
| <b>8:30am</b> | <b>9:00am</b> | <i>CONTENT FORUM 4</i> – presented by <b>Getty Images</b><br><b>“Visual GPS: Trends &amp; Insights for Financial Services”</b><br>Research presentation by <b>Tristen Norman</b> , <i>Head of Creative, The Americas, Getty Images</i> , who will also interview:<br><ul style="list-style-type: none"> <li>• <b>Bill Anstadt</b>, <i>Head of Brand &amp; Design, Morgan Stanley</i></li> </ul>  |
| <b>9:00am</b> | <b>9:30am</b> | <i>CONTENT FORUM 5</i> – presented by <b>Yahoo Finance</b><br><b>“Marketing for Growth: How to Think Across the Funnel”</b><br><b>Alex St. Cin</b> , <i>Head of Finance Industry, Yahoo Finance</i> , will interview:<br><ul style="list-style-type: none"> <li>• <b>Shana Sood</b>, <i>Chief Marketing &amp; Communications Officer, Individual Life Insurance, Prudential Financial</i></li> </ul>   |
| <b>1:15pm</b> | <b>1:30pm</b> | <i>AFTERNOON KICK-OFF</i><br><b>“Industry Forecast”</b> : FCS CEO <b>Kevin Windorf</b> will present the top financial marketing trends for 2026.   |
| <b>1:30pm</b> | <b>2:00pm</b> | <i>CONTENT FORUM 6</i> – presented by <b>OneTrust</b><br><b>“Permission to Personalize: Bridging the Gap between Privacy Compliance &amp; Marketing”</b><br>Presentation by <b>Jeff Huter</b> , <i>Sr. Sales Manager, Consent and Preferences, OneTrust</i> , on how transparent and responsible data use can build brand loyalty and consumer trust.  |
| <b>2:00pm</b> | <b>3:00pm</b> | <i>CONTENT FORUM 7 &amp; 8</i> – presented by <b>Wall Street Journal   Barron’s Group</b><br><b>“What the Data Tells Us About Today’s HNW Audience &amp; Their Media Behavior”</b><br>Research highlights with <b>Katie Weber</b> , <i>SVP, Commercial Strategy and Head of Financial Services, Wall Street Journal   Barron's Group</i><br><b>“Inside Goldman Sachs: How Firmwide Paid Media Meets a New Era of HNW Expectations”</b><br><b>Raakhee Mirchandani</b> , <i>Anchor &amp; Contributing Editor, The Trust   Dow Jones</i> will interview:<br><ul style="list-style-type: none"> <li>• <b>Tavia Davis</b>, <i>Vice President, Firmwide Head of Paid Media, Goldman Sachs</i></li> </ul> <b>“Inside the Investor Mind: Key Trends Every Marketer Should Know”</b><br>WSJ Intelligence insights presented by <b>Katie Weber</b> .<br><b>“From Awareness to Action: How to Connect with Investors Today”</b><br><b>Raakhee Mirchandani</b> will interview:<br><ul style="list-style-type: none"> <li>• <b>Grace Wood</b>, <i>Brand Director, Tastytrade</i></li> </ul> |



January 11-14, 2026  
The Lodge at Spruce Peak, Stowe, Vermont

**MONDAY, JANUARY 12**    **BRAND REPUTATION**

**3:00pm**    **3:15pm**    *BREAK: The bar opens*

**3:15pm**    **3:30pm**    *RAISING THE BAR*  
**"Potent Quotables"**: FCS CEO **Kevin Windorf** presents the top comments from FCS guest speakers in 2025.

**3:30pm**    **4:30pm**    *CONTENT FORUM 9 & 10 – presented by Bloomberg Media*  
**"Introducing Bloomberg Media Insights: Reputation as Capital"**  
Presentation by **Michelle Lynn**, *Global Head of Data Science & Insights, Bloomberg Media*  
**"Reputation, Relevance and a new Brand Story for PGIM"**  
**Michelle Lynn** will interview:  
• **Jaime Kalfus**, *Head of Global Brand Strategy and Advertising, PGIM*  
**"Invesco: From Tech Icon to Enterprise Brand. The Next Chapter"**  
**Sheevani Raikundalia**, *Executive Head of Financial Services Advertising, Bloomberg Media*, will interview:  
• **Katy Brady**, *Director of Brand, Invesco*  
• **Rob Stewart**, *Director - Invesco QQQ Marketing, Invesco*

**4:30pm**    **5:00pm**    *AWARD FORUM 11 – FCS BRAND REPUTATION AWARD PRESENTATION – presented by Business Insider*  
**Anthony DeMaio**, *SVP of Partnerships, Business Insider*, will interview **Tara Giuliano**, *CMO, Nuveen*, the winner of the 2025 FCS Brand Reputation Award.



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**TUESDAY, JANUARY 13**

**PARTNERSHIP**

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| <b>1:15pm</b> | <b>1:30pm</b> | <i>AFTERNOON KICK-OFF</i><br><b>“Financial Marketing: It’s Not All Academic”</b><br><i>FCS Vice Chair <b>Tom Jago</b> will present the top insights from the FCS Marketing Scholars of 2025.</i>   |
| <b>1:30pm</b> | <b>2:00pm</b> | <i>CONTENT FORUM 12 – presented by <b>Fundamental Media</b></i><br><b>“Growing Trust at Scale”</b><br><i><b>Dan Kaepplinger</b>, VP, Client Integration, <b>Fundamental Media</b>, will interview:</i> <ul style="list-style-type: none"><li>• <b>Greg Clunies</b>, Director, Paid Media, <b>Ameriprise Financial</b></li></ul>  |
| <b>2:00pm</b> | <b>2:30pm</b> | <i>CONTENT FORUM 13 – presented by <b>KNow Research</b></i><br><b>“Making Research Matter in Campaign Development”</b><br><i><b>Katrina Noelle</b>, President, <b>KNow Research</b> will interview:</i> <ul style="list-style-type: none"><li>• <b>Kerry Sette</b>, VP, Head of Consumer Insights &amp; Research, <b>Voya</b></li><li>• <b>Joe Agostinelli</b>, Senior Director of Market Research, <b>Morningstar</b></li></ul> |
| <b>2:30pm</b> | <b>3:00pm</b> | <i>CONTENT FORUM 14 – presented by <b>The New York Times</b></i><br><b>“Elevating Client Engagement with Retail Audiences”</b><br><i><b>Jimmy Saunders</b>, Executive Director, <b>The New York Times</b> will interview:</i> <ul style="list-style-type: none"><li>• <b>Mike Bosco</b>, Executive Director, Media &amp; Acquisition, <b>E*TRADE</b> from <b>Morgan Stanley</b></li></ul>  |



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*PARTNERSHIP*

- |        |        |   |
|--------|--------|---|
| 3:00pm | 3:15pm | <i>BREAK: The bar opens</i>   |
| 3:15pm | 3:30pm | <i>RAISING THE BAR</i><br><b>"The FCS In 2026"</b><br><i>FCS CEO Kevin Windorf will briefly discuss plans for Portfolio, Miami and beyond.</i>  |
| 3:30pm | 4:00pm | <i>CONTENT FORUM 15 – presented by Prosek Partners</i><br><b>"Built to Last: How Enduring Brands Win in Finance"</b><br><i>Daniel Allocca, Partner, Prosek Partners, will interview:</i> <ul style="list-style-type: none"><li>• <b>Scott McKay</b>, <i>Head of Marketing &amp; Communications for the Americas, Schroders</i></li><li>• <b>Allison Knightly</b>, <i>Head of Paid Media, Columbia Threadneedle Investments</i></li></ul>  |
| 4:00pm | 4:30pm | <i>CONTENT FORUM 16 – presented by Ptarmigan Media</i><br><b>"What We're Hearing. How Leaders Respond"</b><br><i>Kimberly Boone, CEO, Ptarmigan Media, will share insights on client priorities, bets, and trade-offs and interview:</i> <ul style="list-style-type: none"><li>• <b>Megan Goett</b>, <i>SVP, Chief Marketing Officer, Cboe Global Markets</i></li><li>• <b>Heather Netrosio</b>, <i>Managing Director, Head of U.S., Client &amp; Marketing Strategy, RBC Capital Markets</i></li></ul> |
| 4:30pm | 5:00pm | <i>AWARD FORUM 17: FCS MARKETING PARTNERSHIP AWARD PRESENTATION</i><br><i>Roundtable discussion featuring Tara Giuliano, CMO, Nuveen, and Kimberly Boone, Managing Director, Ptarmigan Media, and Julien Bissuel, CEO, 72andSunny, the winners of the 2025 FCS Marketing Partnership Award.</i>   |