

AGENDA FOR THE FIRESIDE FORUMS

SUNDAY, JANUARY 11

LEADERSHIP

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| 7:45pm | 8:00pm | <p><i>CHAMPION FORUM</i>
 “Taking Home The Gold”
 <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>
 “Game Time”
 <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>
 “Humanizing Finance: Building Trust and Emotional Connection in a Digital-First World”
 <i>Lauren Young, Editor, Digital Special Projects, Reuters will interview:</i></p> <ul style="list-style-type: none"> • Richard Parkinson, Chief Brand & Marketing Officer, Prudential Financial |
| 8:45pm | 9:15pm | <p><i>CONTENT FORUM 2 – presented by Level Agency</i>
 “Bridging the Gap: How Financial Services Leaders Turn Marketing Data into C-Suite Decisions”
 <i>Roundtable discussion featuring:</i></p> <ul style="list-style-type: none"> • Patrick Van Gorder, President, Head of Partnerships, Level Agency • Sheri Gilchrist, Head of Marketing, Communications & Customer Analytics, Fidelity Investments • Sheryl Markov, EVP, Head of Digital Marketing, Demand Generation and Data Analytics, Northern Trust • Katrina Noelle, President, KNow Research |
| 9:15pm | 9:45pm | <p><i>AWARD FORUM 3: FCS LEADERSHIP AWARD PRESENTATION – presented by Life60 Ads featuring Nativo</i>
 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).</p> |

MONDAY, JANUARY 12

BRAND REPUTATION

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



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



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| 3:15pm | 3:30pm | <i>RAISING THE BAR</i>
"The FCS In 2026"
<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>
"Built to Last: How Enduring Brands Win in Finance"
<i>Daniel Allocca, Partner, Prosek Partners, will interview:</i> <ul style="list-style-type: none">• Scott McKay, Head of Marketing & Communications for the Americas, Schroders• Allison Knightly, Head of Paid Media, Columbia Threadneedle Investments |
| 4:00pm | 4:30pm | <i>CONTENT FORUM 16 – presented by Ptarmigan Media</i>
"What We're Hearing. How Leaders Respond"
<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">• Megan Goett, SVP, Chief Marketing Officer, Cboe Global Markets• Heather Netrosio, Managing Director, Head of U.S., Client & Marketing Strategy, RBC Capital Markets |
| 4:30pm | 5:00pm | <i>AWARD FORUM 17: FCS MARKETING PARTNERSHIP AWARD PRESENTATION</i>
<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> |