



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

## AGENDA FOR THE FIRESIDE FORUMS

SUNDAY, JANUARY 11

### LEADERSHIP

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

**MONDAY, JANUARY 12**

**BRAND REPUTATION**

- |               |               |  |
|---------------|---------------|--|
| <b>7:30am</b> | <b>8:15am</b> | <i>BREAKFAST FOR FORUM GUESTS – sponsored by <b>Getty Images</b></i>   |
| <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 – presented by <b>Getty Images</b></i><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, <b>Getty Images</b></i> , who will also interview:<br><ul style="list-style-type: none"> <li>• <b>Bill Anstadt</b>, <i>Head of Brand &amp; Design, <b>Morgan Stanley</b></i></li> </ul>  |
| <b>9:00am</b> | <b>9:30am</b> | <i>CONTENT FORUM 5 – presented by <b>Yahoo Finance</b></i><br><b>“Growing Marketers Who Can Think Across the Funnel”</b><br><b>Alex St. Cin</b> , <i>Head of Finance Industry, <b>Yahoo Finance</b></i> , will interview:<br><ul style="list-style-type: none"> <li>• <b>Shana Sood</b>, <i>Chief Marketing &amp; Communications Officer, <b>Individual Life Insurance, Prudential Financial</b></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 – presented by <b>OneTrust</b></i><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, <b>OneTrust</b></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 – presented by <b>Wall Street Journal   Barron’s Group</b></i><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, <b>Wall Street Journal   Barron's Group</b></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, <b>The Trust   Dow Jones</b></i> will interview:<br><ul style="list-style-type: none"> <li>• <b>Tavia Davis</b>, <i>Vice President, Firmwide Head of Paid Media, <b>Goldman Sachs</b></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, <b>Tastytrade</b></i></li> </ul> |



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**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, Brand North America and EMEA, **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***

**1:15pm      1:30pm**

*AFTERNOON KICK-OFF*

***"Financial Marketing: It's Not All Academic"***

*FCS Vice Chair Tom Jago will present the top insights from the FCS Marketing Scholars of 2025.*

**1:30pm      2:00pm**

*CONTENT FORUM 12 – presented by Fundamental Media*

***"Growing Trust at Scale"***

*Dan Kaepplinger, VP, Client Integration, Fundamental Media, will interview:*

- **Greg Clunies, Director, Paid Media, Ameriprise Financial**

**2:00pm      2:30pm**

*CONTENT FORUM 13 – presented by KNow Research*

***"Making Research Matter in Campaign Development"***

*Katrina Noelle, President, KNow Research will interview:*

- **Kerry Sette, VP, Head of Consumer Insights & Research, Voya**
- **Joe Agostinelli, Senior Director of Market Research, Morningstar**

**2:30pm      3:00pm**

*CONTENT FORUM 14 – presented by The New York Times*

***"Elevating Client Engagement with Retail Audiences"***

*Jimmy Saunders, Executive Director, The New York Times will interview:*

- **Mike Bosco, Executive Director, Media & Acquisition, E\*TRADE from Morgan Stanley**



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