



January 11-14, 2026

The Lodge at Spruce Peak, Stowe, Vermont

AGENDA FOR THE FIRESIDE FORUMS

SUNDAY, JANUARY 11 *LEADERSHIP*

7:45pm	8:00pm	<i>CHAMPION FORUM</i> “Taking Home The Gold” <i>FCS Board Director Etienne Katz and Beth Bamonte, VP, Global Analyst Relations, IBM, will interview Olympic gold medalist Donna Weinbrecht (Moguls, 1992 Albertville, France).</i>
8:00pm	8:15pm	<i>WELCOME SESSION</i> “Game Time” <i>FCS CEO Kevin Windorf will lead an interactive presentation of the Summit’s itinerary.</i>
8:15pm	8:45pm	<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> <ul style="list-style-type: none">• Richard Parkinson, Chief Brand & Marketing Officer, Prudential Financial
8:45pm	9:15pm	<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> <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	<i>AWARD FORUM 3: FCS LEADERSHIP AWARD PRESENTATION – presented by Life60 Ads featuring Native</i> <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. DePau).</i>



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

7:30am	8:15am	<i>BREAKFAST FOR FORUM GUESTS – sponsored by Getty Images</i>
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 – presented by Getty Images</i> “Visual GPS: Trends & Insights for Financial Services” Research presentation by Tristen Norman, Head of Creative, The Americas, Getty Images , who will also interview: <ul style="list-style-type: none">• Bill Anstadt, Head of Brand & Design, Morgan Stanley
9:00am	9:30am	<i>CONTENT FORUM 5 – presented by Yahoo Finance</i> “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, Chief Marketing & Communications Officer, Individual Life Insurance, Prudential Financial
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 – presented by OneTrust</i> “Permission to Personalize: Bridging the Gap between Privacy Compliance & Marketing” Presentation by Jeff Huter, Sr. Sales Manager, Consent and Preferences, OneTrust , on how transparent and responsible data use can build brand loyalty and consumer trust.
2:00pm	3:00pm	<i>CONTENT FORUM 7 & 8 – presented by Wall Street Journal Barron's Group</i> “What the Data Tells Us About Today’s HNW Audience & Their Media Behavior” Research highlights with Katie Weber, SVP, Commercial Strategy and Head of Financial Services, Wall Street Journal Barron's Group “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, Vice President, Firmwide Head of Paid Media, Goldman Sachs “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, Brand Director, Tastytrade



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

3:00pm	3:15pm	<i>BREAK: The bar opens</i>
3:15pm	3:30pm	<i>RAISING THE BAR</i> "Potent Quotables": FCS CEO Kevin Windorf presents the top comments from FCS guest speakers in 2025.
3:30pm	4:30pm	<i>CONTENT FORUM 9 & 10 – presented by Bloomberg Media</i> "Introducing Bloomberg Media Insights: Reputation as Capital" Presentation by Michelle Lynn , <i>Global Head of Data Science & Insights, Bloomberg Media</i> "Reputation, Relevance and a new Brand Story for PGIM" Michelle Lynn will interview: <ul style="list-style-type: none">• Jaime Kalfus, <i>Head of Global Brand Strategy and Advertising, PGIM</i> "Invesco: From Tech Icon to Enterprise Brand. The Next Chapter" Sheevani Raikundalia, <i>Executive Head of Financial Services Advertising, Bloomberg Media</i> , will interview: <ul style="list-style-type: none">• Katy Brady, <i>Director, Brand North America and EMEA, Invesco</i>• Rob Stewart, <i>Director - Invesco QQQ Marketing, Invesco</i>
4:30pm	5:00pm	<i>AWARD FORUM 11 – FCS BRAND REPUTATION AWARD PRESENTATION – presented by Business Insider</i> Anthony DeMaio , <i>SVP of Partnerships, Business Insider</i> , will interview Tara Giuliano , <i>CMO, Nuveen</i> , 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 Kaeplinger, VP, Client Integration, Fundamental Media, will interview: <ul style="list-style-type: none">• 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: <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	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: <ul style="list-style-type: none">• Mike Bosco, Executive Director, Media & Acquisition, E*TRADE from Morgan Stanley



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TUESDAY, JANUARY 13 **PARTNERSHIP**

3:00pm	3:15pm	<i>BREAK: The bar opens</i>
3:15pm	3:30pm	<i>RAISING THE BAR</i> "The FCS In 2026" FCS CEO Kevin Windorf will briefly discuss plans for Portfolio, Miami and beyond.
3:30pm	4:00pm	<i>CONTENT FORUM 15 – presented by Prosek Partners</i> "Built to Last: How Enduring Brands Win in Finance" Daniel Allocca, Partner, Prosek Partners, will interview: <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" Kimberly Boone, CEO, Ptarmigan Media, will share insights on client priorities, bets, and trade-offs and interview: <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> 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.