

THE FINANCIAL BRAND

**FORUM 2016**

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A decorative graphic at the bottom of the page consisting of multiple thin, wavy lines in a light orange color, creating a sense of movement and depth against the dark red background.

# The Financial Brand Forum

MAY 16 – 18, 2016 · THE COSMOPOLITAN OF LAS VEGAS

**The Financial Brand Forum** is the banking industry's premier annual event, created exclusively for marketing, advertising, branding and retail executives working at banks and credit unions.

**The Forum 2016** is specifically built to help financial marketers tackle their biggest branding, marketing and retail challenges, with dozens of strategy sessions and interactive workshops — three days jam-packed with the latest ideas, insights and innovations that are transforming financial marketing today.

**The Forum** is hosted by **The Financial Brand**, one of the largest websites in the banking industry with over **1.65 million readers** in **200+ countries** around the world.

## FACTS & FIGURES

- 1,500** Projected attendees at the Forum 2016
- 500** Retail financial institutions represented
- \$10B** Average asset size
- \$1B** Median asset size
- 63%** Attendees at a VP-level position or higher
- 13%** Attendees with C-level positions
- 96.9%** Say their investment is worthwhile
- 97.2%** Would recommend the Forum to others
- 93.3%** Learn new ways to build and grow their brand



**MONEY BACK GUARANTEE.** If you don't come away with at least a dozen new ideas that will help you build your brand and your bottom line, we will give you your money back — no questions asked.

## Rock Then Roll: The Secrets of Culture Driven Leadership

### Arkadi Kuhlmann

Former CEO and Founder of **ING DIRECT**  
and author of *The Orange Code*

Drawing on his influential work at ING Direct, banking rebel Arkadi Kuhlmann offers his vision of culture-driven leadership. His powerful keynote will give you create a unique business culture that spurs innovation and inspires leadership in everyone from C-level to entry level. Kuhlmann's message can help financial institutions of all sizes increase employee satisfaction and achieve business success.

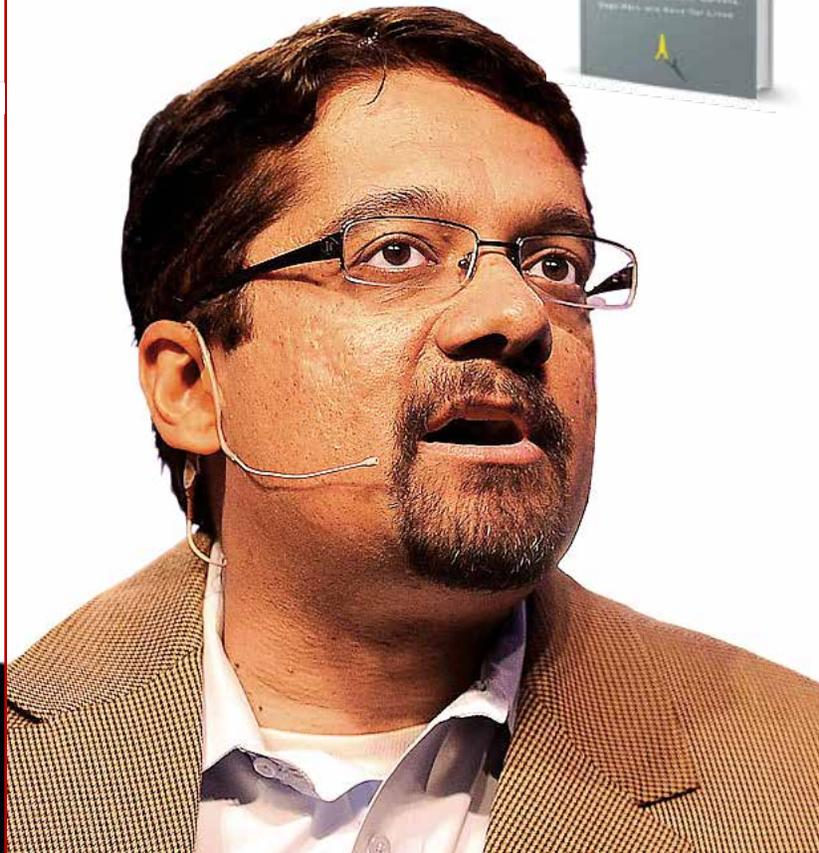
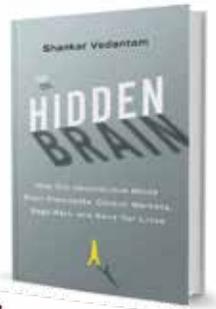


## Inside The Consumer Brain: The Psychology Behind Banking Behaviors

### Shankar Vedantam

Social Science Correspondent at **NPR**  
and author of *The Hidden Brain*

Vedantam will explore how consumers perceive and relate to financial brands, and discuss how people make decisions about their banking providers. This in-depth examination of the (sometimes bizarre) psychology behind consumers' choices will show you how people make choices about managing their money — from the emotional drivers to the rational reasons.



## Culture of Service: The Zappos Story

**Erica Javellana**

Speaker of House at **Zappos.com**

Zappos.com has grown their business because of their unique culture and the service they provide to their customers. Javellana will share the secrets of the Zappos culture, their approach to customer service and how it can be applied in the banking industry. You'll learn how to empower employees and forge stronger connections with consumers by incorporating culture into your financial institution's daily operations.



## Building The Right Marketing Mindset for the Modern Digital World

**Tom Fishburne**

Creator of **Marketoologist**

Tom Fishburne's "Marketoologist" cartoons have been featured in notable publications including the **Wall Street Journal**, **Fast Company** and the **New York Times**. Fishburne will explain how financial marketers struggle in the awkward adolescence of digital marketing, with many still following a "Mad Men" era playbook. This keynote will show you how to forge the foundation and framework of the marketing mindset required to succeed in the modern digital world.



The **Forum 2016** will feature a series of short, high-level strategic presentations from notable experts focused on what you need to do to prepare yourself and your institution for the future — it's like TEDx but for financial marketers.



## **The Age of the Trusted Advisor**

### **Clara Shih, CEO of Hearsay Social**

Clara is author of the New York Times-featured best-seller, "The Facebook Era." Clara will share her perspective on digital communications channels and what financial executives must do to adapt, increase productivity, and thrive in a world where technology advancements and innovation keep accelerating.



## **The Social Bank CEO**

### **Jill Castilla, CEO of Citizens Bank of Edmond**

It may seem out of the ordinary, but social media has opened up many opportunities for Citizens Bank of Edmond's President and CEO Jill Castilla. Find out how a social bank culture and a social CEO adds up to success for this community based bank.



## **Transparency: Banking on Values**

### **Irene Etzkorn, Chief Clarity Officer at Siegelvision**

Irene is one of the nation's leading experts on simplifying communications and marketing in plain English. In her 30-year career, she has helped redefine and simplify marketing messages in some of the world's most complex industries. Irene will explore what it means to be transparent, clear and empathetic, and how these brand attributes can be a point of differentiation for financial institutions.



## **The Unbundling of Financial Services**

### **Neff Hudson, VP/Corporate Development at USAA**

New technologies give consumers direct access to banking services from anywhere without opening an app or visiting a website. So what does that do to your sales strategy? If no one ever visits your online channels, how can you build relationships? Neff examines the new marketing tactics you need to develop and how marketing budgets must adapt.



## **Disrupting Banking In The Digital Revolution**

### **Luvleen Sidhu, CMO at BankMobile**

Luvleen will discuss the innovation gap in the industry that led to the creation of BankMobile, a fee-free, all-digital bank that brings banking into the 21st century. Learn the steps BankMobile needed to take to get where it is today, and how your financial institution can push forward and revolutionize the industry too.



## **Do Well By Doing Good**

### **Michelle Broderick, CMO at Simple**

Michelle started her career focusing on data-driven loyalty marketing programs at Fortune 500 companies like Continental Airlines and the Gap. She was also one of the first employees at Über, where she helped scale their footprint to a true nationwide presence. Michelle's talk will explore how brands and businesses can do well while doing good, touching on the tension between people and profits.

The **Forum 2016** agenda is packed with how-to sessions guaranteed to build both your brand and your bottom line.

We work closely with our lineup of all-star speakers to carefully craft an agenda that's all about "how to" instead of "why you should." Arm yourself with concrete ideas, practical strategies and actionable advice about the most critical branding, marketing and advertising problems you face today — candid, direct, honest and focused on results.

## Essential Survival Skills for the Modern Financial Marketer

**Sam Kilmer**, Senior Director at **Cornerstone Advisors**

Designed for CMOs and marketing VPs, this session will show you how to eliminate marketing friction by aligning with the objectives, priorities and concerns of your internal constituencies. Learn how to prove the value of marketing with the CEO, CFO, COO, board of directors, frontline sales, and various product/business units. **What you'll learn:**



- The management and leadership skills you need to succeed in the new Digital Era
- 10 things financial marketers say and do that can get them fired
- How to shift perceptions of marketing as a fuzzy cost center to a concrete revenue driver
- Marketing accountability, KPIs and the new marketing/delivery scorecard

## Internal Culture Building: Supercharging Employees for Maximum Brand ROI

**Garrick Throckmorton**  
AVP Employee Development & HR  
**Allegacy Federal Credit Union**



**Karen McGaughey**  
Vice President Client Services  
**Weber Marketing Group**



Great companies understand that organizational and financial success hinges on linking "brand" with "culture." Yet many financial institutions are trapped in cultural limbo — where their brands languish, employees lose passion, and growth slows. But with the right cultural strategy, you can take your brand to new levels of performance, alignment and consistency.

### What you'll learn:

- The fundamental steps you must take to achieve synergy between your internal employee culture and your brand strategy
- How to align, inspire and direct your entire workforce to live your brand in bold, fresh ways
- How to uncover and overcome cultural roadblocks and organizational silos holding your brand back

## Maximizing Digital Channels for Onboarding and Cross-Selling

**Jim Marous**, Co-Publisher of **The Financial Brand** and Publisher of the **Digital Banking Report**

See how the best in banking use digital channels to improve the effectiveness of their onboarding and cross-selling efforts. Over 50 case studies will be shared in this high impact presentation, including the cadence and sequence of customer communications. **What you'll learn:**



- How banks and credit unions improve engagement with sales of ancillary services like bill pay, direct deposit, mobile banking and mobile deposits
- How organizations have leveraged their mobile banking application as a selling tool
- The power of contextuality and mobile alerts in selling services

## The C-Suite-Savvy Marketing Plan

**Mark Gibson**  
Chief Marketing Officer  
**Rockland Trust**



**Mary Beth Sullivan**  
Managing Partner  
**Capital Performance Group**



Rapidly shifting channel preferences, the rise of Millennials, and new competitors challenging the status quo all impact your institution's ability to succeed. This session will show you how to prove marketing's power to drive performance, and demonstrate its value as a strategic investment for your institution. Get the tools you need to take command — with the right plan, budget and strategic approach. **What you'll learn:**

- How to structure your marketing plan to help decision-makers understand the impact, power and importance of Marketing
- How to link marketing investment with results to establish a clear picture of ROI for C-level executives
- How to use the annual budgeting and planning process as a stage to redefine Marketing's role

## Guerrilla Marketing: Creating Buzz on a Shoestring Budget

**Joe Sullivan, CEO of Market Insights**



As marketing budgets get squeezed, how can banks and credit unions stand out and get noticed? Guerilla marketing is one of the most effective — yet frequently overlooked — weapons in a brand manager's arsenal, and it doesn't take deep pockets. If you're looking for a super-sized serving of inspiration with some wildly creative ideas, this session is for you. **What you'll learn:**

- Five key steps when planning any guerilla marketing campaign
- How to execute a cost-effective guerilla marketing campaign and leverage the results
- How to avoid the common pitfalls and ensure your campaigns are truly buzz-worthy

## The 'Every Way' Generation: Connecting With Millennial Consumers

**Jason Falls**  
SVP/Digital Strategy at **Elasticity**



Millennials are coming into their own as a buying population, and yet banks and credit unions are still marketing services and solutions built for Baby Boomers. In this revealing talk about consumer psychology, technology and the future of banking, digital thought leader Jason Falls will show financial marketers how to leverage new communications channels when targeting Millennials. **What you'll learn:**

- What financial institutions must do to cultivate strong relationships with Millennial consumers
- How financial marketers need to pivot and respond to the unique wants, needs and expectations of the Millennial generation
- How Millennials spend their time, where they get their information, and how they make decisions

“Really dynamic. Good group of speakers. Very inspiring. Lots to take back to my team.”

— Bruno Jauernig, VP Marketing at TD Bank

**97.6%**

**OF ATTENDEES SAY THEY LEAVE THE FORUM FEELING INSPIRED & MOTIVATED**

## Marketing Data Analytics in Action

**Jay Kassing**, CEO of **MARQUIS**



Data analytics is the modern marketing battlefield in the banking industry. Financial marketers must build their analytics arsenal now, because the data arms race is only going to intensify. Here's what you need to do to turn the mountain of invaluable data inside your institution into offers that are relevant, personal and timely.

### What you'll learn:

- How to supercharge your marketing strategy and optimize ROI by building automated data analytics models
- Best practices in direct and data-driven marketing — based on statistical evidence and results compiled from hundreds of campaigns in the banking industry

## The Financial Marketer's Guide to Winning in the Mobile Channel

**Ann Reichert**

Senior Director of Marketing at **Mitek**



Consumers now spend more time on mobile devices than desktops, making it the most important channel in the financial industry today. Financial marketers that know how to leverage mobile and drive adoption will be the winners. In this case study focused session, you will learn how to build your institution's brand and increase overall profitability by spearheading mobile acquisition and retention initiatives. **What you'll learn:**

- How to drive awareness and adoption of your institution's mobile solutions
- How to attract and acquire new mobile customers across multiple product lines
- Which mobile offers resonate most with consumers... and which ones don't
- How to create effective marketing campaigns that span both digital and traditional media

## Building the Digital Bank of the Future

**Safwan Zaheer**, Director of Digital Transformation at **Accenture**



We're in the midst of one of the largest transformations in the banking industry. Disruption is everywhere, and this is only the beginning.

To keep pace, the bank of future will need to become completely digital. This session will show your financial institution what the very near future of banking looks like, and what you must do to stay competitive.

### What you'll learn:

- How digital technologies are fundamentally transforming expectations and the consumer experience in banking and finance
- Why the future survival of traditional financial institutions hinges entirely on their digital strategy
- The level of innovation necessary to engineer a true digital banking model
- How the digital "table stakes" will skyrocket for tomorrow's banks and credit unions

## Solving the PR Puzzle

**Andrew Ravens**

Vice President/Director of PR & Social Media at **Eastern Bank**



A modernized PR program requires a balanced approach that blends new digital channels with a focus on sound fundamentals. This session will show you how to implement proven tactics — media relations, events, guerilla and content marketing, with a dash of social media and creativity — with candid advice straight from banking's front lines. **What you'll learn:**

- How to generate a continuous drumbeat of news coverage for your financial institution
- How to sharpen your PR skills in digital and social channels
- How to weave new tactics into your traditional PR campaigns

## Competition Removal: 10 Laws Winning Brands Obey

**Steve Brazell**, Founder of **Hitman, Inc.**



For over two decades, Steve Brazell has helped Fortune 500s, startups and celebrities (Intel, IBM, Warner Brothers, Kevin Coster, Coldwell Banker, and Walt Disney) build brands that win. He's distilled what works (and what doesn't) into "The 10 Laws of Competition Removal." This presentation will show you what you must do now to stand out and stay relevant in a fast-changing and hyper-competitive world. This is a master class in brand-building and market strategy.

### What you'll learn:

- Proven techniques to differentiate your brand and stay relevant in a world of constant change
- The right way to stand out, get noticed and win customer loyalty without lowering your price
- The single biggest branding mistakes that will cost you market share
- The critical component new brain science says your marketing is missing
- Three simple steps you can implement to immediately increase sales

## Rebranding Marketing's Role in Financial Services

**Kevin Rose**, Principal at **Deloitte**



The financial industry is being reshaped by innovative new players and outside disruptors, changing the ways that Marketing engages with the broader organization. Find out how the traditional role of Marketing must evolve in response to these major strategic challenges, and how to take the reins to become true customer champions.

### What you'll learn:

- The various strategic models Marketing can leverage to regain its rightful seat at the CXO table
- How Marketing needs to operate in concert with Digital, IT, Innovation and Sales functions
- How Marketing in financial services differs from other industries, and how to capitalize on these differences

## Cracking the Code: Email Marketing Trends & Best Practices in Banking

**Susan Wolfe**  
VP/Financial Services  
**Mintel Comperemedia**



Learn how to acquire, cultivate and retain customers by strategically crafting email campaigns for maximum impact. The insights in this session are supported by research encompassing thousands of email and direct mail marketing campaigns across the banking industry. You will see dozens of case studies illustrating the trends, best practices and strategies that drive success in retail banking today.

### What you'll learn:

- How retail financial institutions leverage email marketing for acquisition, loyalty and customer communication — and how you can do it too
- How to position your email campaigns with powerful subject lines and compelling marketing messages
- The ideal cadence and frequency for your email marketing campaigns (and at what point consumers tune out)

## The 3Cs of Twitter for Banking

**Brian Laker**  
Head of Financial Vertical at **Twitter**



Consumers are spending more time on their smartphones than anywhere else, but marketing on mobile devices presents real challenges. Twitter, however, is a platform that was born on mobile, giving you the tools to reach both customers and prospects. This session will provide financial institutions a simple framework to master Twitter — everything from analyzing Twitter data to content creation.

- ### What you'll learn:
- How to capitalize on Twitter's data to help you market your institution smarter
  - How to use Twitter to acquire and retain customers
  - How to create content for Twitter that is meaningful to your institution's target audience
  - The best ways to connect with consumers through Twitter

## Building 1-to-1 Marketing Journeys in Banking

### John Beauchamp

Vice President of Financial Services  
**Salesforce**



### Shawn Stavseth

Senior Director of Product Development  
**Bluespire**



One-to-one marketing has been an elusive dream for most retail financial institutions, but advances in technology are now making the promise of 1:1 a reality. Learn how digital marketing platforms are paving the way for true 1:1 engagement in the banking industry, including real-world examples, success stories and best practices. **What you'll learn:**

- How to build 1:1 experiences that will achieve your institution's acquisition, onboarding, engagement and retention goals
- Powerful new ways to connect and build 1:1 journeys that span all channels and touchpoints
- How to turn anonymous consumers into known, loyal advocates by aligning customer data with behavioral data

"Excellent! Cutting edge ideas, trends and tangible techniques I can use right away."

— Betsy Knoblock Grabinski, Greater Iowa Credit Union

95.7%

OF ATTENDEES SAY THEY LEARN NEW WAYS TO MARKET THEIR ORGANIZATION MORE EFFECTIVELY

## Building Trust & Relevance in The Digital Age

### Roberto Hernandez, Principal at PwC



Today's consumers see banking providers as impersonal institutions where automated phone trees and computer-generated eStatements dehumanize any sense of connection. But what if digital channels enabled something different? Something more human instead of less personal? This session will show financial marketers how they can leverage digital tools, technologies and communications channels to build trust and forge stronger relationships with consumers. **What you'll learn:**

- What different consumer segments expect from their banking providers, and how their expectations in digital channels are evolving
- What key segments you should focus on as you develop your marketing strategy, and the differences between traditional vs. digital consumer preferences
- The psychology driving consumers' perceptions of speed, ease and convenience when dealing with their bank or credit union

## Consumers Aren't Rational: How Behavioral Economics Can Improve Customer Relationships

### Dan Latimore, SVP/Banking at Celent



Consumers make silly and emotional decisions, but the young field of behavioral economics sheds new light on the reasons people behave irrationally. This illogical pattern of behavior has profound implications for financial institutions, and those that harness it can build strong, positive relationships. **What you'll learn:**

- Specific examples from the latest research exploring how financial consumers make their decisions
- How to develop a strategy and rationale for building relationships that are trust-based, not transactional
- How to design win/win scenarios for both consumers and your institution

## Financial Brand Spotlight: BECU – From Obscurity to Preferred Banking Brand

**Stephen Black**, Vice President of Marketing at **BECU**



Ten years ago, BECU was not a well-known financial brand in their market. Even though they had over \$4 billion in assets and around 350,000 members, they lacked the name awareness and brand image needed for future growth. In 2002, BECU embarked on a journey that would radically transform their organization. Today, BECU has nearly \$14 billion in assets and is closing in on one million members. Find out what it takes to reposition a banking brand, as BECU details its strategy and retraces the steps they took to become one of the financial industry's most admired institutions today.

### What you'll learn:

- How BECU developed a new, distinctive brand strategy and messaging platform
- The changes BECU needed to implement in order to support a major rebranding initiative
- How BECU uses its advertising and marketing muscle to build their brand and change consumer perceptions
- The key metrics BECU uses to monitor and measure the health, stature and awareness of their brand

## How Financial Institutions Can Leverage the Power of LinkedIn

**Peter Kim**, Director of Sales — Relationship Management, Sales Solutions at **LinkedIn**



The way financial institutions drive new business opportunities has changed — cold calls and unsolicited email blasts are no longer effective methods to generate business. Learn how banks and credit unions are making it easier and more efficient way by tapping the power of LinkedIn when developing new business, building relationships, and driving revenues. **What you'll learn:**

- How to find and engage with decision-makers and track existing relationships
- Advanced strategies to help deepen relationships with existing clients, uncover new prospect accounts and drive new revenue
- How LinkedIn can be used to foster collaboration across your sales force

## Effective Marketing for Digital Banking Solutions

**Sam Maule**, Emerging Payments Practice Lead at **Carlisle & Gallagher Consulting Group**



Consumers have a huge appetite for digital banking solutions, and want to manage their financial lives across multiple devices. They expect a high degree of consistency in features and functions across each device. And most importantly, consumers value their own time — ease of use and quick access is a must. How should financial marketers capitalize on America's massive mobile banking addiction? Find out in this high-level, data-driven, research-based session.

### What you'll learn:

- What mobile features you should stress in your marketing
- Consumers' hot buttons, and how to market in those daily mobile moments
- How to position key features like remote deposit capture, mobile payments and funds transfers
- The different features you should market for different devices

**FINAL DISCOUNT**

★  
Banks and credit unions

**Save \$150!**

Hurry, this special offer expires March 31.

★  
**REGISTER NOW**

## Thinking Mobile First

**Deepanjan De**, Industry Lead  
Financial Services at **Facebook**



Mobile is here, and it's bigger than most people ever anticipated. Consumers now spend more time on mobile devices than any other option — even dethroning TV as the long-dominant media channel. But this new mobile reality raises huge questions for financial marketers. How do you reach the consumer segments you care about and tell your brand's story, particularly when “digital” often encompasses more than one type of experience on a single device (e.g., tablets, phones, laptops, etc.)? Most importantly, how do you generate results and measure success in this new, multi-device landscape?

### What you'll learn:

- How to leverage the creative canvas in a mobile world
- How to tell stories across multiple devices
- How to measure success on mobile

“If you have the opportunity to attend only one marketing conference, this is the one.”

— **Katie Segner, SpiritBank**

**94.0%**

**OF ATTENDEES SAY THEY  
WILL DEFINITELY ATTEND  
THE FORUM AGAIN**

## Extracting ROI From Consumer Insight

**Larry Emond**, Managing Partner at **Gallup**



This high-level strategic examination of people's preferences and behaviors across the banking industry will show you how to capitalize on insights you can uncover in consumer research and analytics. Based on Gallup's comprehensive analysis of several million banking consumers worldwide, you'll see how the best in banking turn consumer insight into action, and how they use data to redefine their marketing strategies.

### What you'll learn:

- The critical consumer trends reshaping the banking industry today
- How your marketing strategy must adapt to consumers' changing needs, preferences and evolving patterns of behavior
- How financial marketers can exploit consumer research in ways that build the bottom line

## Evolution of a Digital Banking Ecosystem

**Bill Sullivan**

Global Head of Market Intelligence  
**Capgemini Financial Services**



With increasing competition from more agile, digitally-empowered players, consumer expectations have been redefined, and financial institutions are now lagging behind. To defend their position against new players and enhance the overall experience, banks and credit unions must drive towards a cohesive, integrated “Digital Banking Ecosystem” — embedded in the organization's culture, serving customers and empowering staff. **What you'll learn:**

- How to assess and categorize the digital capabilities of your institution, and compare those against your competitors
- The essentials required to create a truly digital experience, and what holds banks and credit unions back today
- The different approaches financial institutions of different sizes and regions are taking to evolve their “Digital Banking Ecosystem”

You've never seen anything like this before! World class leaders in brand, branch and website design will reveal their creative process and walk through the critical strategic decisions as they tackle actual projects for real financial institutions. This is a rare opportunity to experience first-hand how financial institutions transform their brands.

## Forum 2016 Brand Identity Makeover

MAKEOVER CONSULTANT:

**Gabriel Cohen**  
Chief Marketing Officer  
**Monigle**



MAKEOVER FINALIST:

**Elizabeth Mach**  
First Vice President/Marketing Officer  
**Berkshire Bank**



**Mark Tomasi**  
Creative Director  
**Berkshire Bank**



**Mark Pedrotti**  
AVP/Digital Marketing Director  
**Berkshire Bank**



Reality TV meets bank marketing in one of the most riveting sessions ever presented at a banking conference. This is your chance to spy on the rebranding process, as the team at Monigle reveals new creative branding concepts to **Berkshire Bank** for the first time on stage in front of a live audience. Take advantage of this unique “behind the scenes” opportunity to learn how other financial institutions tackle their brand identity challenges.

### What you'll learn:

- What it takes to craft a differentiated image in the banking world today
- The elements required to design an integrated world-class brand identity
- How to create, evaluate and refine a new look and feel
- How you can prepare for your next rebranding initiative

## Forum 2016 Website Makeover

MAKEOVER CONSULTANT:

**Michelle Brown**  
Director of Marketing  
**ZAG Interactive**



MAKEOVER FINALIST:

**Deidre Davis**  
VP of Marketing and Communications  
**Michigan State University FCU**

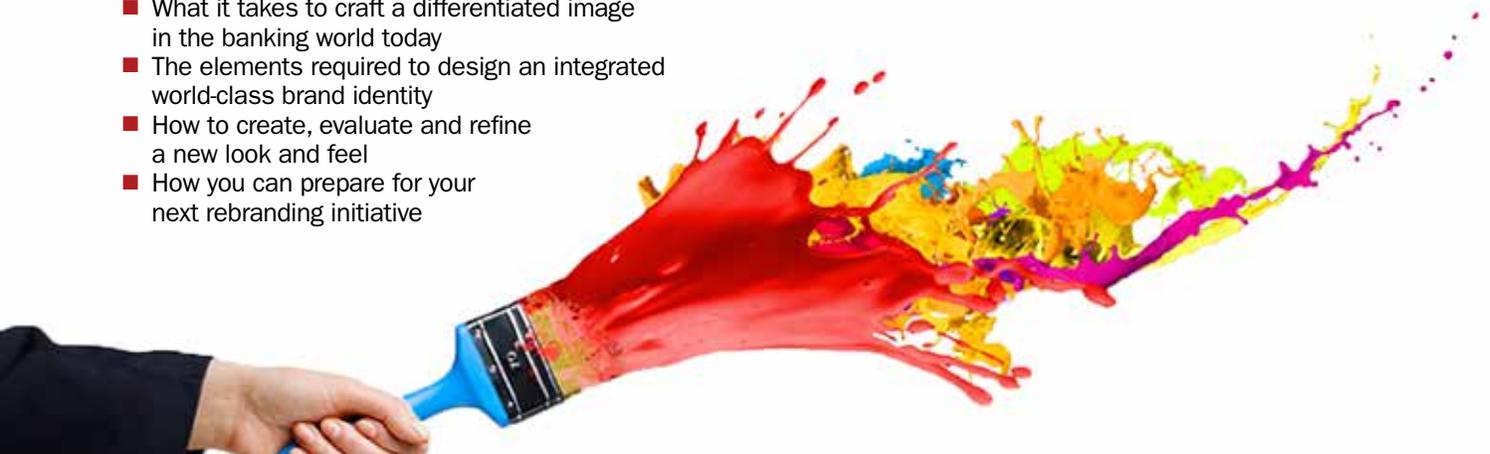


Your website is the biggest “branch” you operate, yet most banks and credit unions are way overdue for a web overhaul. This session will walk you through the process as a real financial institution gets a professional online makeover from a top-notch web experience firm that specializes in the banking industry.

We'll reveal new website designs to **MSU Federal Credit Union** for the first time — live on stage — then take you through the strategy, design decisions, and suite of features critical to success in the online channel today.

### What you'll learn:

- How to navigate through the stages of a major website overhaul — from initial strategy to launch
- Best practices for an optimal digital user experience built on a scalable website using CMS architecture
- How to build consensus across multiple departments and different disciplines to deliver a cohesive “virtual branch”



On Monday, May 16th, the **Forum 2016** will host three intensive, half-day how-to workshops in the afternoon. Pick any one for **only \$265** (limited to bank and credit union attendees only).



### **Branding Workshop: Building a Powerful, Integrated Brand Identity**

**Josh Streufert**

Creative Director at **Weber Marketing**

Nearly half of all consumers see no difference between financial brands. How do you rise above the noise and get noticed in a crowded and commoditized market?

In this intensive, behind-the-scenes workshop, you'll learn how to build a differentiated and distinctive integrated brand identity — one with the emotional resonance you need to grow. Create a powerful and cohesive experience that aligns every aspect of your brand — from web and online channels, to branches and social media.

#### **Workshop takeaways:**

- How to articulate your brand value beyond rates, fees and service
- How to create fresh, new brand experiences across all touchpoints and marketing channels
- How to create a dynamic brand personality with emotional appeal that resonates with your most important and profitable segments
- The keys to building a brand that increases share of wallet, builds brand loyalty, achieves organizational strategic initiatives and drives ROI



### **Data Marketing Workshop: Moving from Campaigns to Experiences**

**Paul Evers**

SVP, General Manager at **Merkle**

**Darcy Hoffmann**

Senior Strategy Director at **Merkle**

To keep pace and sharpen your competitive edge, you must learn to exploit the rich streams of data available today. By becoming true data-driven masters, financial marketers can cultivate relationships and deliver high-impact experiences based on a deep understanding of consumers' needs, wants and desires. When done right, you can achieve the same levels of trust and guidance that was — in the past — only possible in person at your neighborhood branch.

#### **Workshop takeaways:**

- How to engineer a robust data-driven marketing strategy
- How to operationalize data-driven experiences by capitalizing on traditional tools, new platforms and emerging capabilities
- How to turn multiple sources of data into actionable consumer insights
- How to leverage your understanding of consumers to craft experiences that deliver real value
- How to measure and optimize the impact of your data-driven marketing experiences



### **Content Marketing Workshop: Telling Stories That Sell**

**James Robert Lay**

CEO of **CU Grow**

Content marketing is a powerful tool to build brands and engage consumers. But effective content marketing is much more than the occasional blog post or random social media update. This workshop will give you dozens of exercises and examples showing you how to craft a content marketing strategy that moves the needle and achieves real strategic business objectives.

#### **Workshop takeaways:**

- How to attract, acquire and nurture leads through content
- How to produce and distribute content for each stage of the consumer buying journey
- How to create content that can be repurposed for multiple media channels
- How to avoid the biggest and most common content marketing mistakes
- How to measure and quantify content marketing KPIs
- How to sell a content marketing strategy to your executive team

**Bonus:** Each participant receives free copies of *The Financial Content Marketing Guide* and *How to Tell Digital Stories That Sell*.

# Bank and credit union attendees save **\$150.00** when registering now!

Your registration fee includes a full-access pass for all sessions, digital copies of all presentations, a conference workbook, two lunches, two breakfasts, two cocktail receptions and the **Forum 2016 Resource Pack** loaded with valuable resources specifically for financial marketers (total package worth \$3,465).

	Register by December 4, 2015	Register by January 31, 2016	Register by March 31, 2016	Regular Price
All-Access Pass for <b>Banks &amp; Credit Unions</b>	<b>Early Bird Special</b> \$1,045 (save \$450.00)	<b>Winter Discount</b> \$1,195 (save \$300.00)	<b>Final Discount</b> \$1,345 (save \$150.00)	\$1,495
All-Access Pass for <b>Past Forum Attendees</b> (banks and credit unions only)				\$995 (save \$500.00!)
All-Access Pass for <b>Vendors, Consultants &amp; Others</b> (less than 78 left)				\$1,995
<b>Attendee Companion Pass</b> (meals + receptions for your guest)				\$325

  
**forum2016.com**  
Register online

  
**(206) 661-5070**  
Customer care hotline

  
**info@financialbrandforum.com**  
Send us an email

## Group rates — bring your team!

The **Financial Brand Forum** is like a three-day marketing school built just for you. With so many great sessions, don't go alone — bring your team with you and **save big!**

**\$995**  
3 attendees

**Save \$500.00**  
per person!

**\$945**  
4-5 attendees

**Save \$550.00**  
per person!

**\$895**  
6+ attendees

**Save \$600.00**  
per person!

**Please note:** Group rate discounts are available to attendees from banks and credit unions only.

# Cool, Classy & Ultra Chic

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