

# AGENDA

The Future of Marketing in Financial Services: Balancing Trust & Growth

## CMO Dinner

### SPEAKERS



Amy Holtzman  
CMO  
CHEQ



Steve Choi  
Director, Digital  
Marketing & Product  
Owner  
Prudential Insurance



Raman Mallika  
VP, Insights,  
Advertising, Growth  
& Brand  
American Express



Alma Rodriguez  
Piscitello  
EVP, Global Financial  
Services  
Edelman Smithfield



Tina Wadhwa  
Global Marketing  
and Communications  
Director  
Broadridge

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### THE FUTURE OF MARKETING IN FINANCIAL SERVICES: BALANCING TRUST & GROWTH



November 15, 2023

5:30 PM-9:00 PM

Eastern Time

As safety, security, and privacy considerations continue to intensify for financial services marketers, implementing timely and effective brand-building and acquisition strategies can feel insurmountable. To be successful, today's marketing leaders must find the delicate balance between protecting the business and propelling it forward. We'll discuss how marketing can lead with robust cybersecurity measures while delivering long-term, efficient growth, the opportunities and risks of AI for brands, and more.

## PANELISTS



Amy Holtzman  
CMO  
CHEQ

TOGETHER WITH  
**CHEQ**