



AN ACXIOM VIRTUAL EVENT

FINANCIAL MINDS SYMPOSIUM

NOVEMBER 9-10, 2020

acxiom®

MONDAY, NOVEMBER 9

10:00 a.m. EST **Welcome**

Speaker: Tate Olinghouse, President of Financial Services, Acxiom

10:15 a.m. EST ***Diversity and Inclusion for Financial Services Customers***

Few people in the banking industry really understand what is meant by “financial inclusion.” But discussion of the topic has increased, and Financial Services companies are now paying closer attention to people’s diverse and complex needs. Financial inclusion spanning gender, ethnicity, income, age, and other factors empowers people and leads to measurable social and economic improvements. This panel discussion will take a look at the important changes Financial Services providers should consider when designing products and services to improve inclusion.

Moderator: Mary Schlafly, Sr. Client Partner, Financial Services, Acxiom

Panelists: Ron Shevlin, Director of Research, Cornerstone Advisors; Lisa Cregan, Managing Director, Morgan Stanley Wealth Management; Michelle Singletary, Personal Finance Columnist and Author

Key Takeaways:

- Understanding of industry issues related to financial inclusion
- Perspective on what Financial Services providers need to do to create greater inclusion for customers
- An understanding of the impact Financial Services providers can create with societal and economic change

11:00 a.m. EST **Break**

11:15 a.m. EST ***Digital Everywhere: The Future of Digital and Physical Banking***

Earlier this year, banks saw a drop by more than 30% in branch traffic. Research indicates that more than 40% of people plan to reduce their use of physical branches after the COVID-19 pandemic. Change is here to stay. A rapid shift in distribution places an increased focus on digital marketing and servicing capabilities to compete in today’s market. Our experts will share their research on this topic and predictions on what will change in the coming years.

Moderator: Doug Hurst, Managing Client Director, Financial Services, Acxiom

Panelists: Dr. Wei Ke, Managing Partner, Simon-Kucher; Dave Mooney, Former CEO, Alliant Credit Union

Key Takeaways:

- An up-to-date view on people’s behaviors and attitudes about the use of bank branches and digital services
- Perspective on what lies ahead with retail banking distribution and how branches and digital will work together
- How to take learnings from 2020 and put them to use in future plans for selling to and servicing retail bank customers

Noon EST

What's Next for Payments: A Look Ahead

COVID-19 has drastically altered consumer spending. Significant shifts from credit to debit, premium rewards cards to other products, growth in card-not-present (CNP) transactions, and a groundswell of interest for contactless payments has taken place. Issuers are now shifting attention to keep hard-won customers and fine-tuning their propositions to the new future of consumer spending. This session will provide insights into key predictions and changes in the payments industry

Moderator: Scott Woepke, Senior Vice President–Financial Services Strategy, Acxiom

Panelists: Anant Nambiar, Division President, Argus Portfolio Management; Mark Jamison, Global Head of Product Innovation & Design, Visa

Key Takeaways:

- Learn how consumer payment behaviors have changed in 2020 and what changes will likely be permanent
- Gain new perspectives on new payment products and expectations for consumer adoption in the years ahead
- Learn about new strategies for payment product design that support people's expectations and needs

12:45 p.m. EST **Wrap-up**

Speaker: Tate Olinghouse, President of Financial Services, Acxiom

TUESDAY, NOVEMBER 10

10:00 a.m. EST **Welcome**

Speaker: Tate Olinghouse, President of Financial Services, Acxiom

10:15 a.m. EST ***Identity Outlook 2020: The Evolution of Identity in a Privacy-First, Post-Cookie World***

Research by the Winterberry Group facilitates an understanding of the complexities of the rapidly evolving market segment of identity and the significant challenges ahead due to regulatory interventions and evolving browser policies. Based on interviews conducted with more than 100 senior industry experts, we will share healthy changes expected in 2021 that will fuel the next stage of growth for the marketing and advertising industry

Speakers: Bruce Biegel, Senior Managing Partner, Winterberry Group; Kyle Hollaway, Head of Global Identity Practice, Acxiom

Key Takeaways:

- Gain a fresh perspective on the pending end of third-party cookies and other changes impacting the identity landscape
- Learn more about the new set of identity resolution approaches and how they are expanding
- Get a regulatory and privacy outlook and learn how to establish compliant technical standards

11:00 a.m. EST **Break**

11:15 a.m. EST ***The New Era of Martech: The Integration of Martech and Adtech and What Needs to Be Done***

This session will address the marketing accountability void between the fragmented worlds of martech and adtech. Many Financial Services providers have struggled to effectively integrate them, so even as investments are made in data-driven marketing, there are still fragmented experiences, and there still is not a reliable feedback loop between marketing dollars and business outcomes. Acxiom will provide a reality check for marketers on how to bridge the gap so data-driven experiences are creating value for both Financial Services providers and customers.

Moderator: Tate Olinghouse, President of Financial Services, Acxiom

Speakers: Tracy YoungLincoln, EVP, Global Client Solutions & Success, Kinesso; Chad Engelgau, CEO, Acxiom

Key Takeaways:

- In-depth understanding of the persistent marketing accountability problem
- How to establish accountable marketing in your organization
- New ideas on how to bridge the martech and adtech gap

Noon EST

Wrap-up

Speaker: Tate Olinghouse, President of Financial Services, Acxiom