

March 2–3, 2027

Sheraton Centre Toronto Hotel, Toronto

A 2-day, **Peer-led Program** on Scaling Trusted Data, Analytics, and AI Across Financial Services



The working summit for financial services leaders building trusted, scalable data and AI capabilities

Built for data, analytics, AI, and technology leaders across financial services, the Data Analytics & AI for Financial Services Summit tackles the challenge of turning rapid innovation into enterprise value. Explore how peers are scaling AI beyond pilots, strengthening trusted data foundations, and navigating governance, risk, and legacy complexity while improving decisions, customer outcomes, and operational performance.

Across two days, learn directly from leaders in banking, insurance, wealth, fintech, and payments through practical case studies, executive panels, sector-specific tracks, and peer discussions. Benchmark approaches, examine what is working inside financial institutions, and leave with practical frameworks for scaling AI, modernizing data capabilities, and turning strategy into execution.

2027 Summit Highlights

01

Two Days Built Exclusively for Financial Services

Connect with data, analytics, AI, and technology leaders from banking, wealth, insurance, fintech, and payments.

03

Three Dedicated Financial Services Sector Tracks

Choose conversations specifically designed for Banking & Wealth Management, Insurance, and Fintech & Payments.

05

Interactive Peer-to-Peer Roundtables

Move beyond presentations and benchmark your biggest challenges directly with other financial services data and AI leaders.

07

Meet the Technology Partners Behind Transformation

Use dedicated exhibitor-lounge time to compare solutions, discuss active projects, and source expertise for your technology roadmap.

02

23+ Senior Financial Services Speakers

Hear directly from leaders at organizations, including RBC, TD, Scotiabank, CIBC, BMO, Manulife, Sun Life, Wawanesa, Interac, and Wealthsimple.

04

Compete vs. Protect

Explore both sides of the data opportunity: using intelligence to drive growth and differentiation while strengthening fraud and financial-crime defences.

06

Structured Networking Built Into Both Days

Speed networking, networking lunches, exhibitor lounge sessions, and peer discussions create multiple opportunities to build valuable industry relationships.

08

Practical Case Studies, Not Just Big Ideas

Learn directly from practitioners tackling real financial services challenges, with sessions designed around implementation, measurable outcomes, and lessons that can be taken back to your organization.

Is Your Role Here

You'll be in the room with peers who own results

If you work across any of these functions, you'll take away practical strategies, proven approaches, and peer-led insights you can apply within your organization.

Data, Analytics & Insights

Data Leadership, Analytics, Business Intelligence, Data Science, Enterprise Intelligence

AI, Technology, & Transformation

Artificial Intelligence, Innovation, Technology, Engineering, Data Architecture, Business Transformation

Data Management & Governance

Data Management, Data Governance, AI Governance, Data Enablement, Data Products

Risk, Compliance, & Protection

Risk, Compliance, Financial Crime, Fraud, Privacy, Cybersecurity



Register Now →

Who you'll meet in Toronto

Connect with senior leaders across data, analytics, AI, technology, governance, risk, and transformation from Canada's financial services sector. Expect peers responsible for turning strategy into execution, from scaling AI and modernizing data foundations to strengthening governance, improving decision-making, and delivering measurable business outcomes.



What Past Attendees Say

Don't just take our word for it! Here's what past delegates say about the takeaways, connections, and ROI.

Helpful speaker sessions showcasing a depth of expertise across speakers, great networking opportunities, and valuable workshops!



I was happy to be invited as a VIP. It allowed me to hear from seasoned industry professionals and take insights and connections back to CIBC for future collaboration.



Knowledgeable speakers. Great networking opportunities, room for inspiration, and idea sharing / generation.



I loved learning and listening to the panellists, and the speakers were inspiring.



Great event to network.



Agenda at a Glance

Eastern Std. Time	DAY 1 – TUESDAY, MARCH 2, 2027
7:45 AM	Networking Breakfast & Registration
8:45 AM	Opening Comments from Your Host
9:00 AM	From Pilot Purgatory to Production
9:30 AM	Speed Networking
10:00 AM	The Economics of Enterprise AI
10:30 AM	From Copilots to Colleagues
11:00 AM	Refreshments & Exhibitor Lounge
11:30 AM	Governance at Machine Speed
12:00 PM	The Data Operating Model is Broken
12:30 PM	Networking Lunch
1:30 PM	Exhibitor Lounge
1:45 PM	Strategy Track: Build, Buy, or Partner? Technology Track : Cutting Through the Noise
2:15 PM	Strategy Track: Beyond the Chatbot / Technology Track: From Pipelines to Products
2:30 PM	Track 1: Beyond the Dashboard / Track 2: Beyond the Data Team
3:00 PM	The New Lineage Challenge
3:30 PM	Exhibitor Lounge
4:00 PM	Prediction isn't The Decision
4:30 PM	Data Literacy isn't Enough
5:00 PM	Closing Comments From Your Host
5:15 PM	Evening Reception

Eastern Std. Time	DAY 2 – WEDNESDAY, MARCH 3, 2027
7:45 AM	Networking Breakfast
8:45 AM	Opening Comments from Your Host
9:00 AM	The Intelligent Financial Institution
9:30 AM	Where Should Your Data Live?
10:00 AM	Interactive Roundtables
11:00 AM	Exhibitor Lounge
11:30 AM	Sector Tracks: Banking & Wealth / Insurance / Fintech & Payments
12:00 PM	Sector Tracks: Banking & Wealth / Insurance / Fintech & Payments
12:30 PM	Networking Lunch
1:30 PM	Exhibitor Lounge
1:45 PM	Compete vs Protect Tracks: GenAI Value / AI-Powered Fraud
2:15 PM	Compete vs Protect Tracks: AI Advantage / Financial Crime
2:45 PM	Exhibitor Lounge
3:00 PM	Human in the Loop — or Human in the Way?
3:30 PM	The Financial Institution of 2030
4:00 PM	Closing Comments From Your Host
4:15 PM	Summit Close

Featured Speakers

[View All Speakers →](#)

Hear directly from senior marketing and growth leaders shaping digital strategy across banking, insurance, credit unions, wealth, and fintech with practical perspectives you can apply immediately.



Justin Pursaga

Chief Data & Analytics
Officer



Janet Lin

Chief Information Officer



Tarundeep Dhot

VP & Head, Canadian
Fraud Management



Robert Keast

VP, Customer Data
Management



Karen Cutler

VP & Chief
Underwriting Officer



Denisse Rodriguez

Head, Strategic Initiatives,
AI Enablement & Vendor
Strategy



Palash Thakur

VP, Head of Data
Analytics & Fraud (CDO)



Shweta Shenoi

Vice President, Financial
Crime Compliance



Iyyad Jariri

Associate Vice President,
Data Engineering



Lovell Hodge

Head of AI



Jamie Campbell

Head of AI



Nabarun Lahiri

Head of Data
Governance



Featured Speakers

[View All Speakers →](#)



Dave Skura

AVP, Data Technical
Architecture



Sangeetha Varghese

Director, Data & Artificial
Intelligence Enablement



Mo Bayan

Director, Business
Intelligence & Data
Enablement



Wenqi (Angela) Xu

Director, Risk Control &
Fraud Analytics



Kerry Khoo Fazari

Head of Data Science &
Engineering, Chief Data
Office



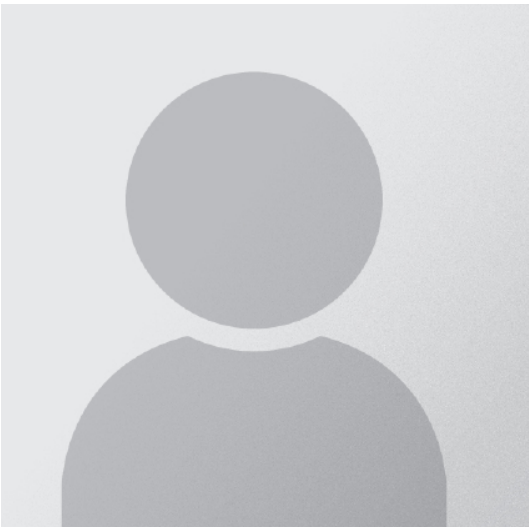
Peter Mercurio

Senior Director, Pricing
& Portfolio Optimization



Jeremy Hulme

VP, Operational Excellence
& Transformation,
Client Service Delivery



Christopher Hayes

Director,
AI & Data Product



Sofia Gomez de Silva

Director, Data
Governance & Culture



Christina Wood

Executive Director,
Global Electronic FX



Afsaneh Fazly

AI Research Director



Manoja Manoharan

AVP, AI Enablement &
Business Intelligence



Featured Speakers

[View All Speakers →](#)



Kathryn Lattuca

Director, Strategy & Transformation



Lin Liu

Director, Data Science **Wealthsimple**



Sandeep Agarwal

Director of Technology **Scotiabank.**

7:45 –8:45 AM

Networking Breakfast: Build Community Contacts

- Start your day off right and connect with **data and analytics leaders in financial services**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices**, and prepare for the day ahead.

8:45–9:00 AM

Opening Comments from Your Host

Gain insight into today’s sessions so you can get the most out of your conference experience

9:00–9:30 AM

Opening Keynote / Case Study: From Pilot Purgatory To Production

Engineering the Data and AI Foundation for the Intelligent Financial Institution

- Build reusable data products and governed context layers that give AI and agents trusted access to customer, transaction, risk, and operational data.
- Engineer real-time, production-ready AI architecture by connecting modern data platforms, APIs, lineage, governance, observability, and human oversight.
- Scale intelligent decisioning across customer engagement, fraud and financial crime, underwriting, research, and operations — with clear controls and measurable value built in from day one.

9:30–10:00 AM

Speed Networking! → Make Meaningful Connections

Grow your network by meeting like-minded individuals to share your latest ideas and projects with:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a **fun and agile fashion**.
- **Join a community** of data leaders in financial services and gain invaluable support.

10:00–10:30 AM

Industry Expert Content: The Economics of Enterprise AI

How to Control the Cost of AI Without Slowing Innovation

- Match the right model, infrastructure, and deployment approach to the right financial services workload — rather than defaulting to the largest model or most expensive compute.
- Apply AI FinOps, workload optimization, and hybrid infrastructure strategies to control inference, compute, and data costs as AI usage scales.
- Measure the unit economics of AI across use cases to determine what to scale, optimize, redesign, or retire based on measurable business value.

10:30–11:00 AM

Executive Panel: From Copilots To Colleagues

How to Engineer Financial Services for the Agentic Enterprise

- Orchestrate AI agents across complex, multi-step workflows — from customer servicing and operations to fraud investigation, research, and financial decisioning.
- Engineer seamless agent-to-agent and human-to-agent handoffs, connecting AI securely with enterprise applications, APIs, and core financial systems.
- Redesign workflows around intelligent execution, determining where agents should assist, act autonomously, escalate to humans, or coordinate with other agents.



Jamie Campbell
Head of AI
Manulife Canada



Janet Lin
Chief Information Officer
Equitable Bank

11:00–11:30 AM

Refreshments Break & Exhibitor Lounge: Attend Vendor Demos & Consult Industry Experts

- Explore the latest **data analytics technology** and strategies catered to financial services with our industry-leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

11:30–12:00 PM

Industry Expert: Governance At Machine Speed

How to Build Adaptive Data Controls for the AI Era

- Shift from static policies and manual approvals toward machine-readable policies, automated controls, and continuous enforcement across data and AI environments.
- Activate metadata, classification, and policy intelligence to dynamically determine who — or what — can access data, for which purpose and under what conditions.
- Embed adaptive controls directly into data products, AI workflows, and enterprise platforms, so governance follows information wherever and however it is used.

12:00–12:30 PM

Panel: The Data Operating Model Is Broken

How to Redesign the Data Function for the AI-Native Financial Institution

- Reengineer the central data function — deciding which capabilities should be centralized, embedded in business domains, delivered as shared platforms, or combined with AI teams.
- Establish product-based ownership that connects data engineers, governance, analytics, AI, and business leaders around persistent financial services products and measurable outcomes.
- Create new accountability and funding models that give domains greater execution power while preserving enterprise standards, interoperability, and regulatory control.



Nabarun Lahiri
Head of Data Governance
TD



Palash Thakur
VP, Head of Data Analytics
& Fraud (CDO)
Interac

12:30–1:30 PM

Networking Lunch: Delve into Industry Conversations

- Meet interesting speakers and pick their brains on the **latest data analytics issues**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **financial services colleagues in data**.

1:30–1:45 PM

Exhibitor Lounge: Visit Booths & Win Prizes

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers and special content**.

1:45–2:15 PM

TRACK 1: STRATEGY, LEADERSHIP, & TRANSFORMATION

PANEL: BUILD, BUY, OR PARTNER?

How to Architect the Financial Institution’s AI Ecosystem

- Determine where proprietary advantage genuinely matters — and what models, agents, data products, and AI capabilities should be built internally, bought, or delivered through strategic partners.
- Architect for optionality through modular platforms, model choice, and interoperable capabilities that allow institutions to switch, combine, and evolve providers without rebuilding the AI stack.
- Redesign technology partnerships around shared innovation, IP ownership, portability, resilience, and measurable value rather than traditional vendor relationships.



Denisse Rodriguez
Head, Strategic Initiatives,
AI Enablement & Vendor
Strategy
Scotiabank

TRACK 2: TECHNOLOGY, DATA, & AI ENGINEERING

PANEL: CUTTING THROUGH THE NOISE

How to Engineer the AI-Native Financial Services Data Stack

- Connect transactional systems, lakehouse, and warehouse environments, streaming, data products, APIs, vector stores, and semantic layers into a coherent AI-ready architecture.
- Engineer data flows across batch, streaming, and AI workloads to deliver fresh, contextual information wherever models, applications, and decisions consume it.
- Eliminate redundant pipelines, unnecessary data movement, and overlapping technology layers through simpler integration patterns and reusable architectural components.



Iyyad Jariri
Associate Vice President,
Data Engineering
Interac Corp.



Dave Skura
AVP, Data Technical
Architecture
IG Financial

2:15–2:45 PM

TRACK 1: STRATEGY, LEADERSHIP, & TRANSFORMATION

CASE STUDY: BEYOND THE CHATBOT
How to Build an AI Assistant That Financial Professionals Actually Use

- Design around high-value advisor and employee workflows — identifying where conversational AI can reduce search, synthesis, and administrative work while improving the client experience.
- Engineer an intelligent knowledge layer using RAG, enterprise search, permissions, and contextual retrieval to deliver relevant answers from complex financial information.
- Embed AI assistants into everyday tools and workflows, combining continuous evaluation, feedback loops, and usage analytics to improve accuracy, adoption, and measurable value over time.



Lovell Hodge
Head of AI
BMO Wealth Management Growth Office

TRACK 2: TECHNOLOGY, DATA, & AI ENGINEERING

CASE STUDY: FROM PIPELINES TO PRODUCTS
How to Engineer Reusable Data Products for Financial Services

- Build production-grade data products with standardized contracts, APIs, metadata, and quality expectations that make financial data easier to discover, understand, and consume.
- Engineer once and serve many — delivering the same trusted customer, transaction, risk, or operational data across analytics, applications, streaming, and AI workloads.
- Operationalize data products through automated testing, observability, versioning, and lifecycle management so teams can consume them with the reliability expected from software products.

2:45–3:00 PM

TRACK 1: STRATEGY, LEADERSHIP, & TRANSFORMATION

CASE STUDY: BEYOND THE DATA TEAM
How to Run Data and AI as a Business Value Portfolio

- Translate data and AI initiatives into measurable outcomes across revenue growth, customer value, fraud losses, risk, productivity, and operational efficiency.
- Build value frameworks that connect investment, adoption, and business impact —creating visibility into which initiatives are delivering, which need intervention, and which should be stopped.
- Reallocate talent and investment dynamically toward the highest-value opportunities rather than allowing legacy projects and technology activity to dictate the portfolio.



Sangeetha Varghese
Director, Data & Artificial Intelligence Enablement
Wawanesa

TRACK 2: TECHNOLOGY, DATA, & AI ENGINEERING

CASE STUDY: BEYOND THE DASHBOARD
How to Engineer Reusable Data Products for Financial Services

- Build a trusted semantic layer that gives employees and AI tools a consistent understanding of financial metrics, customers, products, and business performance.
- Combine conversational analytics, embedded BI, and AI-generated insights to deliver intelligence directly within the applications and workflows where decisions happen.
- Engineer a modern BI environment that reduces dashboard sprawl, increases self-service, and measures success through adoption, decision speed, and business impact.



Mo Bayan
Director, Business Intelligence & Data Enablement
Sun Life

3:00–3:30 PM

Industry Expert: The New Lineage Challenge

How to Build End-to-End Traceability for AI Decisions and Actions

- Extend lineage across data, models, prompts, retrieved context, agents, tools, outputs, and downstream actions to create an end-to-end record of AI execution.
- Capture the evidence behind AI-generated decisions through model provenance, versioning, observability, and immutable audit trails that allow teams to reconstruct what happened and why.
- Operationalize AI traceability across complex production environments so risk, compliance, and technology teams can investigate decisions without introducing manual bottlenecks.

3:30–4:00 PM

Exhibitor Lounge: Attend Vendor Demos & Consult Industry Experts

- Enjoy **exclusive sponsor demos** and experience the next level of data analytics innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

4:00–4:30 PM

Case Study: Prediction Isn't The Decision

How to Turn Advanced Analytics into Better Financial Decisions

- Combine predictive models with business rules, optimization, and decision science to improve pricing, credit, retention, portfolio, and risk decisions.
- Move beyond model accuracy by measuring whether analytics actually change decisions and improve financial outcomes.
- Embed analytical models directly into business workflows, so predictions trigger consistent actions, interventions, and next-best decisions.

4:30–5:00 PM

Case Study: Data Literacy Isn't Enough

How to Build an AI-Enabled Financial Services Workforce

- Define the AI capabilities required across different roles — from confidently interrogating AI outputs to knowing when to delegate, challenge, escalate, or apply human judgement.
- Embed AI learning directly into workflows through role-based training, experimentation, champions, and continuous learning rather than relying on one-off enterprise training programs.
- Measure whether AI enablement is actually changing behaviour and performance through adoption, workflow redesign, productivity gains, and improved employee outcomes.

5:00–5:15 PM

Closing Comments From Your Host

Review the key solutions and takeaways from today's sessions. Optimize essential action points you can start using immediately. Discuss tomorrow's highlights!

5:15–6:15 PM

Evening Reception: Enjoy Great Conversation, Music, & Networking

- **Relax and unwind** after a long day of learning.
- **Celebrate the close of Day 1** with speakers, sponsors, and peers.
- **Continue conversations, build relationships, and compare priorities** across mandates and jurisdictions before tomorrow's audience-specific tracks.

6:15 PM

Conference Adjourns to Day 2



7:30–8:45 AM

Networking Breakfast: Build Community Contacts

- Start your day off right and connect with **data analytics leaders in financial services**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices**, and prepare for the day ahead.

8:45 –9:00 AM

Opening Comments from Your Host

Gain insight into today’s sessions so you can get the most out of your conference experience.

9:00–9:30 AM

Opening Executive Panel: The Intelligent Financial Institution

Where Will Data and AI Actually Change the Economics of Financial Services?

- Identify where data, analytics, and AI can create the greatest economic advantage across customer growth, pricing, underwriting, fraud, advice, and operations.
- Reinvent high-value financial services decisions and processes rather than simply using AI to make existing workflows incrementally faster.
- Concentrate investment on capabilities that can materially improve revenue, cost-to-serve, productivity, loss prevention, and customer lifetime value.

9:30–10:00 AM

Industry Expert: Where Should Your Data Live?

How to Build the Right Cloud, Data, and AI Infrastructure for Financial Services

- Determine where customer data, payment systems, risk platforms, analytics, and AI workloads should run based on sensitivity, latency, resilience, regulatory requirements, and business value.
- Design hybrid architectures that connect on-premise, private, and public cloud environments without creating unnecessary data movement, duplicated infrastructure, or new operational dependencies.
- Build portability, observability, and resilience into critical workloads so your institution can adopt new data and AI capabilities without becoming dependent on a single technology provider.

10:00–11:00 AM

Roundtables: Discover Thought-Provoking Ideas

Take a deep dive down the innovation rabbit hole in one of our roundtable discussions. Share common challenges and best practices with your data analytics peers on a topic of your choosing

- 1. Where Is AI Actually Delivering ROI in Financial Services?**
Share which use cases have moved beyond pilots, where measurable value is emerging, and which investments are proving difficult to justify.
- 2. How Much Autonomy Are You Really Ready to Give AI?**
Compare where institutions are comfortable automating decisions, where humans remain essential, and what needs to change before greater autonomy becomes acceptable.
- 3. Is Your Data Foundation Actually Ready for AI?**
Discuss the practical blockers — data quality, access, integration, metadata, legacy architecture, and ownership — that are still slowing AI and analytics initiatives.
- 4. How Do You Build a 360° Customer View That Actually Changes the Customer Experience?**
Explore identity resolution, real-time signals, customer intelligence, personalization, and next-best action across banking, wealth, insurance, and payments.
- 5. Can Financial Institutions Keep Up With AI-Powered Fraud?**
Examine synthetic identity, deepfakes, scams, and transaction monitoring, and how customer, identity, behavioural, cyber, and AML signals can be connected faster.
- 6. What Should the Data and AI Team Look Like in Three Years?**
Debate centralized vs. embedded teams, data-product ownership, AI teams, governance, skills, funding, and how the role of the data function is changing.

11:00–11:30 AM

Exhibitor Lounge: Visit Booths & Source Expertise

- Explore the **financial data analytics technology** and strategies with our industry-leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

TRACK 1: BANKING & WEALTH MANAGEMENT

CASE STUDY: A 360° VIEW ISN'T THE FINISH LINE

How to Turn Customer Data into Customer Intelligence

- Resolve customer identities and connect account, transaction, product, digital, advisor, interaction data into a trusted, continuously updated customer profile.
- Apply analytics and decisioning to identify life events, changing behaviours, attrition risk, product needs, and next-best opportunities across banking and wealth relationships.
- Embed customer intelligence into digital channels, CRM, and advisor workflows, so insights trigger timely offers, interventions, and personalized financial experiences.

TRACK 2: INSURANCE

CASE STUDY: BEYOND PREDICTING LOSS

How to Turn AI into an Underwriting Advantage

- Adapt traditional actuarial information with new internal and external data signals to create a more dynamic understanding.
- Bolster advanced analytics and AI to improve pricing accuracy, strengthen risk selection, and identify changing exposures.
- Advance from predicting risk to actively preventing it by translating intelligence into earlier interventions.



Karen Cutler
VP & Chief Underwriting Officer
Manulife

TRACK 3: PAYMENTS & FINTECH

CASE STUDY: THE MOMENT THAT MATTERS

How to Turn Real-Time Payment Signals into Real-Time Decisions

- Connect transaction, payment, merchant, behavioural, and contextual signals through streaming data infrastructure to understand what is happening as transactions occur.
- Apply real-time analytics and decisioning to trigger personalized offers, payment routing, customer interventions, retention actions, and other next-best decisions.
- Embed decision engines directly into payment and fintech journeys so intelligence can trigger actions in milliseconds rather than feeding another retrospective dashboard.

TRACK 1: BANKING & WEALTH MANAGEMENT

INDUSTRY EXPERT: WHEN THE CUSTOMER CONTROLS THE DATA

How to Win in Consumer-Driven Banking

- Connect customer-permissioned data with existing customer, account, and transaction information through secure APIs, identity, consent, and interoperable data architecture.
- Activate newly connected financial data through analytics and decisioning to improve onboarding, personalization, financial advice, credit decisions, and customer engagement.
- Develop new products, partnerships, and customer experiences that capitalize on financial data moving more securely between banks, fintechs, and other providers.

TRACK 2: INSURANCE

INDUSTRY EXPERT: WHEN SHOULD AI MAKE THE CALL?

How to Build the Next Generation of Underwriting

- Connect internal and external data with predictive models and AI to create faster, richer risk assessments.
- Automate routine underwriting decisions while routing complex or higher-risk cases to the right underwriter.
- Embed AI directly into underwriting workflows with clear decision thresholds, monitoring, and human escalation.

TRACK 3: PAYMENTS & FINTECH

INDUSTRY EXPERT: PAYMENTS WITHOUT PAUSE

How to Build the Data Infrastructure for Real-Time Payments

- Build resilient, real-time data infrastructure that can support always-on payments and growing transaction volumes.
- Connect transaction data, analytics, and decisioning to improve routing, authorization, and payment performance.
- Modernize legacy payment architecture through APIs, streaming data, and interoperable platforms that can respond in real time.

12:30–1:30 PM

1:30–1:45 PM

1:45–2:15 PM

Networking Lunch: Delve Into Industry Conversations

- Meet interesting speakers and pick their brains on the **latest analytics issues**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **financial services colleagues in data**.

Exhibitor Lounge: Visit Booths & Win Prizes

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

TRACK 1: COMPETE

CASE STUDY: BEYOND THE COPILOT
Where Generative AI Is Actually Creating Value in Financial Services

- Target high-value applications across customer service, advisor support, operations, research, compliance, and knowledge-intensive work.
- Move successful GenAI use cases into repeatable workflows by connecting them to trusted enterprise data, systems, and processes.
- Measure value through productivity gains, faster decisions, lower operating costs, improved service, and increased adoption.

TRACK 2: PROTECT

CASE STUDY: IDENTITY IS THE NEW PERIMETER

How to Defend Financial Services Against AI-Powered Fraud

- Connect identity, device, behavioural, and transaction signals to detect suspicious activity across onboarding, authentication, and payments.
- Strengthen identity verification against deepfakes, synthetic identities, and AI-enabled impersonation without creating unnecessary customer friction.
- Apply real-time analytics and adaptive authentication to increase scrutiny when risk changes and intervene before transactions or accounts are compromised.

2:15–2:45 PM

TRACK 1: COMPETE

PANEL: THE AI ADVANTAGE

How to Build Competitive Advantage When Everyone Has Access to AI

- Identify where AI can create differentiated products, customer experiences, and financial decisions rather than simply reduce costs.
- Combine proprietary customer and transaction data with AI to build capabilities that competitors cannot easily replicate.
- Turn successful AI capabilities into scalable advantages across personalization, advice, pricing, product development, and customer engagement.



Lin Liu
Director, Data Science
Wealthsimple

TRACK 2: PROTECT

PANEL: THE DATA BEHIND THE DEFENCE

How to Build a Connected Intelligence Layer for Financial Crime

- Unite transaction, customer, identity, behavioural, cyber, and AML data to create a more complete view of suspicious activity.
- Apply real-time analytics and intelligent detection to identify patterns, relationships, and emerging threats across previously disconnected signals.
- Give fraud teams, AML investigators, and decisioning systems access to shared intelligence so they can investigate and intervene faster.



Tarundeep Dhot
VP & Head, Canadian Fraud Management
TD



Wenqi (Angela) Xu
Director, Risk Control & Fraud Analytics
CIBC

3:30–4:00 PM

Closing Executive Panel: The Financial Institution Of 2030

What Will Separate the Leaders from the Rest?

- Define the capabilities that will differentiate leading financial institutions from intelligent decision-making and hyper-personalized experiences to automated operations and new products and services.
- Explore how business models, operating structures, and the workforce will evolve as AI becomes embedded across customer, risk, and operational decisions.
- Determine where financial institutions should place their biggest bets today to build capabilities that remain differentiated as technology becomes increasingly commoditized.



Shweta Sheno
Vice President, Financial Crime Compliance
RBC

4:00–4:15 PM

Closing Comments From Your Host

Review the key solutions and takeaways from the conference. Source a summary of action points to implement in your work

4:15 PM

Conference Concludes

2:45–3:00 PM

Exhibitor Lounge: Attend Vendor Demos & Consult Industry Experts

- Enjoy exclusive **sponsor demos** and experience the next level of data analytics for financial services innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

3:00–3:30 PM

Case Study: Human in The Loop — or Human in The Way?

How to Redesign Financial Services Decisions for the AI Era

- Deconstruct complex financial services workflows into decisions that can be automated, augmented, or reserved for human judgement based on complexity, consequence, and exception.
- Engineer dynamic human-AI handoffs that allow routine decisions to flow automatically while intelligently escalating ambiguity, exceptions, and higher-risk scenarios.
- Measure whether human intervention is improving the outcome — or simply adding latency, cost, and duplicated effort — and continuously recalibrate the level of autonomy as AI capabilities improve.



Jeremy Hulme
VP, Operational Excellence & Transformation, Client Service Delivery
CIBC Mellon

Stay at the Sheraton Centre Toronto Hotel

Downtown Toronto at your doorstep

Located in Toronto's Financial District, the Sheraton Centre Toronto Hotel puts you steps from the Entertainment District and major city attractions. With the conference and accommodation in one place, you can spend less time travelling and more time making the most of your visit, while still having downtown Toronto's dining, entertainment, and landmarks within easy reach.



Built for conversation

Designed to bring people together, the Sheraton Centre combines extensive meeting facilities with open, collaborative spaces throughout the hotel. Continue conversations beyond the conference sessions in the lobby, over drinks, or in the hotel's 2.5-acre outdoor waterfall garden, giving you more opportunities to connect with fellow attendees, speakers, and industry peers throughout your stay.



Comfortable, self-contained stay

Settle into stylish guest rooms featuring Sheraton Signature beds, ergonomic workstations, and large windows overlooking downtown Toronto or the Waterfall Garden. Onsite, you'll also find a heated indoor-outdoor pool, 24-hour fitness centre, and convenient dining options, including Dual Citizen for coffee, breakfast, and meals and 43 Down for cocktails and bites.

DISCOUNTED ROOM RATE

\$349/night

Available on a first-come basis whilst rooms are available.



Save travel time and arrive ready for the event by staying onsite.

A discounted room rate of **\$349/night** is available until **February 8, 2027**, on a first-come, first-served basis while rooms remain available.



Reserve Your Room

For your convenience, please use this booking link to **make your reservation online now!**

Book Your Room Now →

***subject to availability

Important: Strategy Institute is not affiliated with, nor does it contract, any third-party room booking service. Please contact **Sheraton Centre Toronto Hotel** directly to make your reservation.

Get Your Ticket

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Full In-Person Access Includes:



Full conference access across all keynote, panel, workshop, and roundtable sessions



In-person networking with senior public sector leaders, speakers, and sponsors



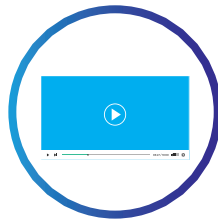
Breakfast, lunch, refreshments, and onsite networking reception



Access to the Expo Hall and solution showcase



Presentation materials and speaker resources (where available)



3 months of on-demand replay access after the event



Virtual Access Available

Can't attend in person? Live stream access is available for remote attendees and distributed teams.

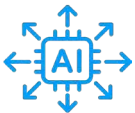


Bring your team & save

Why Attend as a Team?

Sending a team allows you to divide sessions, bring back broader insights, and align departments on shared priorities.

This event features multiple tracks covering:



Enterprise AI at Scale



Data Strategy & Governance



Agentic & Generative AI



Modern Data Architecture



Real-Time Intelligence



Fraud, Risk, & Financial Crime



Group Rates Available

Groups of 3 qualify for discounted pricing from **\$695 per person**. Contact **Louis Youpa** for the best available rate for your organization.

Contact:

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Pass Type	Rate	Deadline
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 Team Rates (3)	\$695 PP	Ends Oct 30, 2026
 Live Stream Access	\$595	Ends Oct 30, 2026