

FCS RFK Summit 2025 – Takeaway Panel Recap

The [FCS RFK 2025 Summit](#) closed with a compelling panel discussion moderated by Katrina Noelle, President of [KNow Research](#), with three CMOs: John Brockleman from [State Street Global Advisors](#), Jennifer Grazel from [RBC Capital](#), and Rebecca Kniesel from [Jennison Associates](#). The session focused on discussing key learnings and actionable takeaways from the Summit.

The conversation began with each CMO sharing what inspired them from the event. Brockleman highlighted the evolution beyond the traditional "brand versus performance marketing" debate, noting how the industry has embraced both approaches while bringing creative energy to performance marketing. Grazel focused on AI developments, particularly emphasizing the opportunities for financial services to form advisory councils similar to those created during the early days of social media adoption. She shared her experience rolling out AI products, stressing the importance of narrative development and explaining AI's role in their value chain.

Kniesel found inspiration in two areas: the book "[Multipliers](#)" mentioned during the summit, and the impressive collective expertise of financial marketers present at the event. She emphasized how the gathering demonstrated the industry's substantial "firepower" and challenged attendees to collaborate with others to tackle the industry's performance measurement challenge.

The discussion then shifted to concrete actions the panelists planned to implement. Kniesel highlighted the need to address performance measurement, suggesting that despite it being 2025, the industry still struggles with meaningful metrics that resonate with various stakeholders. She proposed organizing a group to tackle this challenge collectively.

Grazel shared plans to expand RBC's "Ideas Happen Here" platform, drawing inspiration from State Street's successful internal launch approach. She emphasized the importance of employee engagement in shaping external campaigns and building authentic brand trust.

Brockleman mentioned two specific takeaways: implementing AI usage reporting in campaign reviews and his intent to bring legal counsel and compliance teams to agency meetings, suggesting a more integrated approach to creative development.

The conversation evolved to address broader industry themes:

1. Challenges to differentiation in the category
2. Importance of context; consider the contextual environment where your content does/could sit
3. Lifestyle brands; what would it mean to act like one?
4. Looking outside the financial category for inspiration
5. The human element; motivating and collaborating with stakeholders, internal teams and external partners
6. Presenting the 'right,' most impactful/relevant data to internal stakeholders; what metrics do you take to the board?

As the panel turned to attendees' wish lists for FCS RKF Summit 2026 content, the audience actively participated, especially when discussing geopolitical challenges facing brands. Grazel shared insights about the importance of being "contextual in real time" while navigating major policy changes, referencing issues like banks pulling out of climate alliances and evolving DEI initiatives.

The panel demonstrated how financial marketing continues to push boundaries while maintaining necessary compliance and risk management and C-suite involvement. A notable moment of agreement came when discussing CEO support for major brand initiatives. Noelle observed how panelists' enthusiasm visibly peaked when describing instances where their CEOs supported significant brand studies or launches, suggesting the crucial role of executive backing in successful marketing initiatives.

Throughout the discussion, there was a palpable sense of community and openness among competitors sharing insights and challenges. This collaborative spirit was repeatedly noted as a distinctive feature of the Summit, with attendees expressing appreciation for the candid sharing of experiences and strategies.