



Please Note: This is a replica of the GI Financial Marketing Strategy Awards online entry form. Your actual responses must be entered and submitted via the online version of this form in order to enter. Thank you.

## ABOUT THE AWARDS

**Welcome to entry form page to the 24th Annual Gramercy Institute Financial Marketing Strategy Awards, honoring excellence in financial marketing strategy. It's simple to enter!**

**This award recognizes STRATEGIC EXCELLENCE in financial marketing. Twenty-four years ago, the Gramercy Institute established this award based on the premise that marketing STRATEGY is the most critical element of a successful marketing endeavor—especially in the financial services sector.**

## ABOUT THE ENTRANT

**\* 1. Primary contact for future communications regarding this entry:**

Name:

Title:

Company:

Address:

Email Address(s):

Phone 1:

Phone 2:

**\* 2. For what financial brand has this marketing strategy been conceived?**

**\* 3. Please tell us the title of this entry/strategy**

\* 4. Is your entry (strategy) an example of (please pick one):

- ☐ A financial firm marketing Its own services
- ☐ An ad agency or marketing consultancy servicing a financial firm
- ☐ A media company providing (media) services to a financial firm
- ☐ A marketing services provider to a financial firm
- ☐ A corporation marketing its financial performance to key audiences (corporate)
- ☐ Other (please specify)

5. Please list all names, titles & companies that are to be credited in association with this entry:

## ABOUT THE ENTRY

\* 6. How would you describe your entry (please select all that apply):

- ☐ Business-to-Business Marketing Strategy
- ☐ Business-to-Intermediary Marketing Strategy
- ☐ Business-to-Consumer Marketing Strategy

Other (please specify)

\* 7. What is the geographic scope of your entry:

- ☐ Global
- ☐ International
- ☐ Domestic (Single Country)

\* 8. Approximately how many employees are employed by this financial brand worldwide?

- ☐ Less Than 200
- ☐ 201-2,000
- ☐ 2,001-10,000
- ☐ More Than 10,000

**\* 9. How would you best describe the audience(s) targeted by this strategy (choose as many as may apply)**

- ☐ Business Audience-Targeted
- ☐ Consumer-Targeted
- ☐ Individual Investor-Targeted
- ☐ Institutional Investor-Targeted
- ☐ Intermediary-Targeted (i.e.: financial advisors or insurance brokers)
- ☐ Special Influencer-Targeted

Other (please specify)

**\* 10. Which category(ies) best describe(s) the financial products or services of your entry?**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Accounting                                     | <input type="checkbox"/> Corporate (Firms marketing to Financial Audiences)   | <input type="checkbox"/> Miscellaneous Financial Products & Services (Consumer) |
| <input type="checkbox"/> Asset Management                               | <input type="checkbox"/> Credit Card & Payment Systems                        | <input type="checkbox"/> Personal Finance                                       |
| <input type="checkbox"/> Bank-Commercial Lending                        | <input type="checkbox"/> Currency Exchange                                    | <input type="checkbox"/> Retirement Services                                    |
| <input type="checkbox"/> Bank-Merchant Services                         | <input type="checkbox"/> Crypto Currency                                      | <input type="checkbox"/> Tax Preparation  |
| <input type="checkbox"/> Bank-Retail Services                           | <input type="checkbox"/> Investment Banking                                   | <input type="checkbox"/> Wealth Management                                      |
| <input type="checkbox"/> Brokerage                                      | <input type="checkbox"/> Insurance (Life & Annuities)                         | <input type="checkbox"/> Securities Exchange                                    |
| <input type="checkbox"/> Commodities Exchange                           | <input type="checkbox"/> Insurance (Property & Casualty)                      |   |
| <input type="checkbox"/> Consumer Lending (Mortgage, Home Equity, Auto) | <input type="checkbox"/> Miscellaneous Financial Products & Services (B-to-B) |   |

☐ Other (please specify)

**\* 11. What types of marketing (listed below) are MOST PROMINENTLY utilized in your marketing strategy? (choose a maximum of four):**

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> AI-Enhanced Marketing | <input type="checkbox"/> Metrics & Optimization       | <input type="checkbox"/> Social Media (Paid)                        |
| <input type="checkbox"/> Branding              | <input type="checkbox"/> Mobile/ Tablet/App Marketing | <input type="checkbox"/> Traditional Advertising (TV, Print, Radio) |
| <input type="checkbox"/> Collateral            | <input type="checkbox"/> Out of Home                  | <input type="checkbox"/> Video                                      |
| <input type="checkbox"/> Content Marketing     | <input type="checkbox"/> Podcasts                     | <input type="checkbox"/> Web Advertising                            |
| <input type="checkbox"/> Direct Mail           | <input type="checkbox"/> Programmatic                 | <input type="checkbox"/> Webinars                                   |
| <input type="checkbox"/> Email                 | <input type="checkbox"/> Public/Media Relations       | <input type="checkbox"/> Web Site                                   |
| <input type="checkbox"/> Event Marketing       | <input type="checkbox"/> Search Marketing             | <input type="checkbox"/> Viral Marketing                            |
| <input type="checkbox"/> Internal Marketing    | <input type="checkbox"/> Social Media                 | <input type="checkbox"/> VOD / CTV / OTT                            |

Other (please specify)

## ENTRY FORM

12. SITUATION (50 words or less): Please describe the benchmark situation of the financial marketer prior to engaging this marketing strategy.

13. OBJECTIVE (50 words or less): Please state the end objective of your marketing strategy.

14. STRATEGY (100 words or less): Please state the marketing strategy you chose to achieve this end objective. (20 points)

15. EXECUTION (200 words or less): Please describe the tactics employed to support this strategy. (25 points)

16. INNOVATION (75 words or less): What was specifically fresh or innovative about this strategy or execution? (15 points)

17. METRICS EMPLOYED (150 words): Please describe the system of measurement employed (or to be employed) to monitor success of marketing efforts. (15 points)

18. RESULTS (150 words or less): What end results were achieved with respect to original objective? If not all results are known at this point, please describe what results are known. (15 points)

19. OPTIMIZATION/LEARNING (200 words or less): Please explain what was learned along the way, and how such knowledge was used to optimize or adjust future thinking and/or action. If too early to describe, please describe what optimization mechanisms are called for/set-up and how results are planned to be optimized. (10 points)

**\* 20. TERMS AND CONDITIONS:**

**GI Financial Marketing Strategy Awards**

This program exclusively evaluates financial marketing strategy work according to the following entry categories:

**ENTRY CATEGORIES**

Accounting, Asset Management, Bank-Commercial Lending, Bank-Merchant Services, Bank-Retail Services, Brokerage, Commodities Exchange, Consumer Lending (Mortgage, Home Equity, Auto), Corporate (Firms marketing to Financial Audiences, Credit Card & Payment Systems, Currency Exchange, Crypto Currency, Investment Banking, Insurance (Life & Annuities), Insurance (Property & Casualty), Miscellaneous Financial Products & Services (B-to-B),

Miscellaneous Financial Products & Services (Consumer), Personal Finance, Retirement Services, Tax Preparation, Wealth Management, Securities Exchange, Other.

Gramercy Institute reserves the freedom to place entries into categories that may be different from those originally submitted by entrant.

**SUBCATEGORIES**

Winners may be subcategorized based on: Global, International, Domestic (Single Country) And/or Audience type and/or Marketing type.

**WHO CAN ENTER?**

Any company (financial firm agency, publisher, marketing services provider) that has conceived and/or executed asset management marketing work within the past 18 months for the benefit of a financial services firm (corporate entries are also accepted). This includes:

- Financial firms marketing their own products or services
- Agencies/consultancies Media companies/publishers/marketing service providers on behalf of financial firms marketing their products or services.

**CONFIDENTIALITY**

Submitted entry forms describing marketing work become property of the Gramercy Institute and will be treated confidentially.

Submitted samples of entrant creative executions and marketing work do not become property of Gramercy Institute.

Only Gramercy Institute and its judges will be given access to entries, and judges will be given access to these entries with the understanding that they are reviewing them for the

sole purpose of assessment for this specific award program.

### **JUDGING**

Judging will be carried out by a panel of financial services marketing leaders from the world's financial, media and marketing brands. Not all judges score all briefs.

The full judges' roster will be made public to all entrants. Judges' scores will be averaged together to determine category winners.

### **NOTIFICATION OF WINNERS**

Entrants will be notified on the status of their entry (winning or not winning) by February 28, 2026, via email.

### **PROMOTION OF WINNERS**

All winners will be promoted through Gramercy Institute website, HTML emails and social media. Non-winners will not appear on promotions.

### **AWARD PRESENTATION**

Winning teams will be presented with trophies (no charge for trophies) at a Forum/Award Presentation. Tickets are required to attend to the Forum & Award Presentation.

### **TROPHIES**

If winners cannot attend Forum & Award Presentation, they may purchase trophies to be shipped to them after the Forum & Award presentation.

☐ **I read and accept these terms and conditions.**

Click on the "CONTINUE" button to enter your strategy into The Gramercy Institute Financial Marketing Strategy Awards. PLEASE NOTE your entry will not be submitted until you complete the payment portion of the form. You will be taken to the payment site after you click on the "CONTINUE" button.

All submissions become property of The Gramercy Institute.