



The Banker / BrandFinance® Banking  
Forums 2013

# Leadership in the Banking Industry: How does leadership drive brand value?

**19th March 2013**

Agenda

**Venue**

New York Athletic Club  
180 Central Park S  
New York  
NY 10019

**Publishing Partner:**

**The Banker**

**Sponsor:**

**Landor**

# The Banker / BrandFinance® Banking Forums 2013



## The Forum: 17:00 - 20:00

### Leadership in the Banking Industry: How Does Leadership Drive Brand Value?



The banking industry has experienced a tumultuous period over the last four years. The vilification and continued criticism directed at western banks may mean that those brands which understand the new rules for the banking industry will be best placed to emerge more strongly from this difficult period.



It has been a successful year for the US banking industry with Wells Fargo replacing HSBC as the world's most valuable banking brand. Wells Fargo's achievement demonstrates the improved standing of US banks as they recover from the financial crisis and forge ahead.



However, Chinese banks also continue to improve their collective results and with the global financial meltdown arguably still far from over, the ways in which bank brands can reposition themselves to focus on new customer expectations will be critical.



In achieving these changes, strong leadership for banking brands has never been more important. Join us at the The Banker / BrandFinance® Banking Forum 2013 where we will consider how leadership can be valued and measured and what role leadership plays in driving brand value.



#### Who should attend?

CEOs, CMOs, CFOs and senior managers of corporate brands who are interested in understanding the value of their brands.

# New York - Tuesday 19<sup>th</sup> March

## The Banker / BrandFinance® Banking Forum 2013

Leadership in the Banking Industry: The Effect on Brand Value

Timing	Synopsis	Speakers
<b>5:00pm - 5:30pm</b> <i>Registration - Drinks and canapés</i>		
5:30pm - 5:40pm	Welcome & Introduction to session 1: Executive Summary of results from the Banker / Brand Finance Banking 500 study	Elise Neils Managing Director <b>Brand Finance USA</b>
5:40pm - 5:50pm	Video presentation of the North American banks that made the Brand Finance Banking 500	Elise Neils Managing Director <b>Brand Finance USA</b>
5:50pm - 6:20pm	Keynote - Perspectives on the value of leadership to achieve alignment in the banking sector	Steve Denning <b>Author and former Director, The World Bank</b>
6:20pm - 6:40pm	Brand is as a brand does: Shifting perception through action	Mich Bergesen Global Director, Financial Services <b>Landor Associates</b>
<b>6:40pm - 6:50pm</b> <i>Refreshment Break</i>		
6:50pm - 6:55pm	Introduction to Session 2: Brand Leadership in the banking industry - Something needs to change...	Edgar Baum Managing Director <b>Brand Finance Canada</b>
6:55pm - 7:15pm	<b>TBC</b>	Dermot Boden Chief Brand Officer <b>Citigroup</b>
7:20pm - 7:55pm	Panel session - Brand leadership in the banking industry: Innovating to drive brand value  Moderated by: Edgar Baum, Managing Director, <b>Brand Finance Canada</b>	Steven Denning, <b>former Director, The World Bank</b>  Ken Dabbs, <b>Wells Fargo</b>  Dermot Boden, <b>Citigroup</b>
7:55pm - 8:00pm	Awards Ceremony	Elise Neils Managing Director <b>Brand Finance USA</b>
<b>8:05pm - 9:00pm</b> <i>Drinks and canapés</i>		



## **Elise Neils, Managing Director, Brand Finance USA**

Elise Neils specialises in the valuation and monetization of tangible and intangible assets, including businesses, brands, securities, trademarks, patents and patent applications, naming rights, copyrights and other intellectual property for companies, non-profits, governmental entities, and attorneys. Elise has supervised and participated in hundreds of complex international valuation assignments involving brand creation, merger and acquisition transactions, strategic planning, GAAP and IFRS compliance, SEC reporting, tax reporting, litigation, and estate planning.

Elise has experience valuing intellectual property within a wide range of industries, with a particular focus on the Sports & Entertainment Industries. She has valued many world-famous, important brands in a variety of business sectors, including: Malibu®, Realtor®, Budweiser®, Woolmark®, and Maker's Mark®. She has also spoken extensively on valuation and related issues to many associations, legal groups, and corporate groups.



## **Steve Denning, Academic and Author of 'The Leader's Guide to Radical Management'**

Born and educated in Sydney, Australia Steve studied law and psychology at Sydney University and worked as a lawyer in Sydney for several years. He did a postgraduate degree in law at Oxford University in the U.K. Steve then joined the World Bank where he worked for several decades in many capacities and held various management positions, including Director of the Southern Africa Department from 1990 to 1994 and Director of the Africa Region from 1994 to 1996. From 1996 to 2000, Steve was the Program Director, Knowledge Management. He now works with organizations in the U.S., Europe, Asia and Australia on leadership, innovation, radical management and organizational storytelling.

Steve Denning is the author of several books, including *The Leader's Guide to Storytelling: Mastering the Art and Discipline of Business Narrative*, (Jossey-Bass, 2nd Edition 2011) and *The Leader's Guide to Radical Management* (Jossey-Bass, 2010)



## **Mich Bergesen, Global Director, Financial Services, Landor Associates**

Mich joined Landor in 2005 and leads the firm's financial sector branding practice, working across our office network to bring a category specialist perspective. He manages global client programs covering the spectrum of brand strategy development and implementation, with deep experience in both consumer and institutional financial services. Previously, he spent 11 years at Stern Stewart, originators of the Economic Value Added approach to financial management. He founded Stern Stewart's business in South Africa, then served as managing director of Stern Stewart Europe. He later launched BrandEconomics® in New York, advising clients on building and managing brand value. He developed the valuations used in Landor's Breakaway Brands® list published in *Fortune* and *Forbes*.

Mich holds an MBA in strategy and finance, and a BS and MS in engineering.



## **Dermot Boden, Chief Brand Officer, Citigroup**

Dermot Boden joined Citigroup in March 2011, as the company's first Chief Brand Officer. In this position, Dermot is the steward of Citi's brand; leading brand strategy and ensuring that branding and marketing are effective and consistent across the range of Citi's businesses. Dermot chairs Citi's Brand Council and oversees the Global Branding and Sponsorship groups.

For more than 25 years, Dermot has led businesses, built brands and driven creative marketing initiatives. Prior to joining Citi, he served as Executive Vice President & Global Chief Marketing Officer at LG Electronics since 2007 in Seoul, Korea. He created, defined and built a clear brand positioning, connecting emotionally with consumers, that drove sales for the range of the LG portfolio, including mobile communication devices, home entertainment and household appliances.

Before that, he spent 10 years at Pfizer, including three years in Tokyo as Vice President and General Manager. Dermot has also held management positions at Johnson & Johnson, where he worked for 12 years, in five business units and in three continents.

He earned a Bachelor of Humanities degree in Psychology and Economics from London University.



## **Edgar Baum, Managing Director, Brand Finance Canada**

Edgar Baum has an extensive background over 15 years in entrepreneurial and consulting environments with extensive experience in developing adaptable financial forecasting programs.

Previously Edgar ran his own data analytics and financial consulting practice and has previously been a Partner and Vice President for a Toronto based financing consultancy firm. Edgar has worked with companies ranging from start-ups to multinationals across a range of industries including manufacturing, logistics, education, food, and security. Edgar was also the founding partner for a software company that developed a risk and valuation model for domestic and global businesses.

Prior to these roles Edgar has worked at Procter & Gamble, Merrill Lynch and Nesbitt Burns. Edgar is a graduate of the University of Toronto. He has been a guest at Seneca's Graduate School delivering a lecture on confidentiality protocols in M&A transactions.

Edgar is the Managing Director of Brand Finance Canada.

# Sponsors and Associate Organisations

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## The Banker

### The Banker

The Banker is the world's premier banking and finance magazine. Read in 150 countries around the world, The Banker is the key source of data and analysis for the industry. Its unique database of more than 4000 banks maps their financial strength and soundness via Tier 1 capital, their profitability, and their performance versus their peers. The Banker has been providing global financial intelligence since 1926 and has built a reputation for objective and incisive reporting on major events. The Banker's senior editors travel the world to interview senior bankers and world leaders, giving the magazine a unique insight on global trends.

For more information, please visit [www.thebanker.com](http://www.thebanker.com)

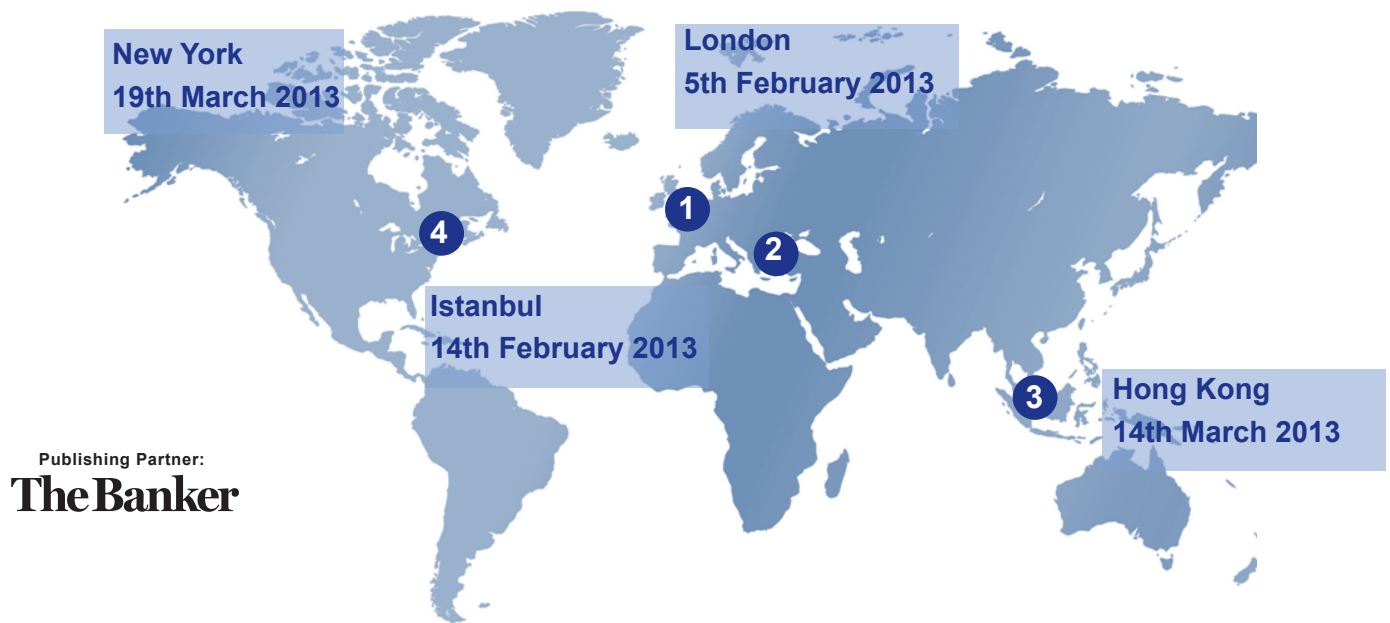


### Landor Associates

Landor Associates is one of the world's leading strategic brand consulting and design firms. Founded by Walter Landor in 1941, Landor pioneered many of the research, design, and consulting methods that are now standard in the branding industry. Partnering with clients, Landor drives business transformation and performance by creating brands that are more innovative, progressive, and dynamic than their competitors.

Landor's holistic approach to branding is a balance of rigorous, business-driven thinking and exceptional creativity. Its work spans the full breadth of branding services, including brand research and valuation, brand positioning and architecture, naming and writing, corporate identity and consumer packaging design, branded experience, brand equity management, brand engagement, and digital branding.

## London - Istanbul - Hong Kong - New York



## Forthcoming Global Events

*as of January 2013*



**more at... [www.brandfinanceforum.com](http://www.brandfinanceforum.com)**

# About Brand Finance

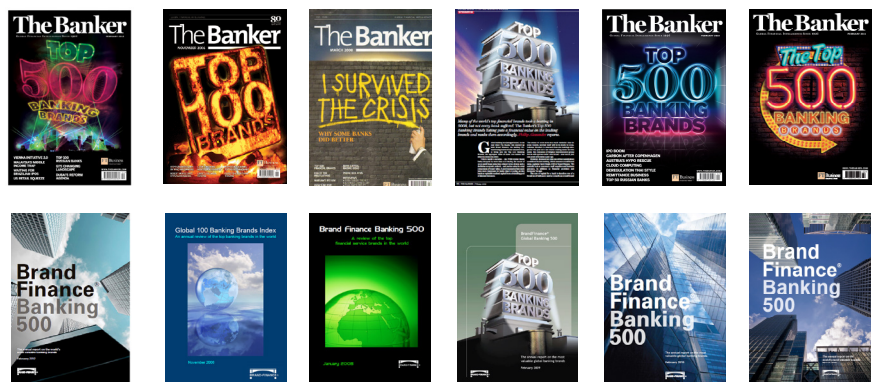


Brand Finance is the world's leading brand valuation consultancy. We advise strongly branded organisations on how to maximise their value through the effective management of their brands and intangible assets. Headquartered in London, Brand Finance is represented in over 15 countries worldwide.

The *BrandFinance*<sup>®</sup> *Banking 500*, now in its sixth year, directly compares the values of the world's leading banking brands. It is the only direct comparison of brand value within the banking industry.

The study provides an opinion on the point-in-time value of the world's leading banking brands. Each brand has been accorded a brand rating: a benchmarking study of the strength, risk and future potential of a brand relative to its competitor set, as well as a brand value: a summary measure of the financial strength of the brand.

Brand Finance uses the royalty relief methodology, which is a discounted cash flow (DCF) technique to discount estimated future royalties, at an appropriate discount rate, to arrive at a net present value (NPV) of the trademark and associated intellectual property: the brand value. The royalty relief approach is used for three reasons: it is favoured by tax authorities and the courts because it calculates brand values by reference to documented third-party transactions; it can be done based on publicly available financial information and it is compliant to the requirement under the International Valuation Standards Committee (IVSC) to determine Fair Market Value of brands.



Brand Finance is delighted to have teamed up with *The Banker*, the monthly international financial affairs magazine, for the sixth year running to publish the results.



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## About Brand Finance Forums

Brand Finance is committed to the development of theoretical and practical issues surrounding brands. As part of this process, we organise a series of events and forums around the world where leading practitioners in the area of brand strategy, brand building and brand valuation come together to share their experiences and to better understand the process by which valuable brands are created.

The Brand Finance Forum has progressively become one of the definitive events in the area of brand valuation and should not be missed by anyone who is serious about maximising the value of their brands and intangible assets.

To find out more visit [www.brandfinanceforum.com](http://www.brandfinanceforum.com)

## BRANDIRECTORY



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Brandirectory is an online encyclopedia of brands where financial results, visual identities, trademark histories and the latest marketing news will be compiled and shared. It is an invaluable resource for brand managers, offering detailed brand profiles and comparative analysis across all major commercial sectors.

To find out more visit [www.brandirectory.com](http://www.brandirectory.com)







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