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Building the INSITE Conference Content Engine for BNY

BNY Pershing partners with thousands of advisors and firms across the country, and brings that community together for its annual INSITE conference. When BNY set out to reintroduce a unified "1BNY" story to the market during the 2025 event, the firm turned to Intention.ly to **help build the content and programming behind it.**

1,500+ attendees
at the Baltimore-based conference

42+ sessions
architected, scripted, and programmed for a single unified narrative

6 months
from strategy to stage

UNIFYING A FRAGMENTED PROCESS

Before Intention.ly stepped in, BNY's conference planning was split across multiple divisions, each responsible for its own content and strategic direction. There was a need for a centralized decision-making process and dedicated time for internal marketing and leadership teams to coordinate the dozens of speakers, sessions, and content threads involved in a conference of this size. **BNY needed a partner who understood the RIA mindset well enough to guide the entire programming process, creating sessions that felt compelling and distinct while reinforcing the broader 1BNY story.**

Aligning teams and stakeholders around the vision for the event

Intention.ly ran regimented weekly calls with appointed leaders across BNY to keep the work moving and on schedule. Our approach centered around bringing the contextual knowledge built from working with hundreds of firms across the country directly into the agenda, providing recommendations on content focus, speaker selection, and a time-based structure that could adapt as necessary.

Building INSITE from the ground up

Intention.ly's team handled the full scope of content and programming for INSITE, including:

- Content creation across more than 42 sessions
- Event programming and strategy guidance
- Script writing for BNY's executive leadership team
- Full agenda planning
- Visual direction to bring mainstage presentations to life

Every session was prescriptively crafted to reinforce BNY's new enterprise narrative, bringing BNY and Pershing together into one unified story carried throughout the event.

FROM THE STORYBOARD TO THE STAGE

INSITE drew more than 1,500 attendees and went off without a hitch. BNY's core message, bringing BNY and Pershing together under a single mission, came through clearly in the mainstage presentations and messaging work. The event positioned INSITE as one of the strongest conferences in financial services, and BNY's team credited Intention.ly's execution directly as a reason the conference came together so well.

Get in touch to learn more.

Let's talk about what we can work together to achieve. **Contact Kelly Waltrich at kelly@growintentionally.com,** visit https://intention.ly, or scan the QR code.