

ENGINE
by Gen

Engine Insights

March 2026



Hello,

Spring is here, and we have a lot to share.

In this quarterly update, we highlight our upcoming spring thought leadership programs, where we are partnering with leading industry associations and publications to bring together senior product and marketing leaders for conversations around Secure Financial Wellness, as well as practical ideas on consumer acquisition, engagement, and monetization in today's attention economy—one increasingly shaped by the adoption of AI in our daily personal and professional lives.

Insurance is now native to the Engine network

Gen Digital has acquired Trellis, the company behind Savvy, a leading digital insurance marketplace.

This brings a full suite of insurance capabilities directly into Engine—including auto, motorcycle, home, renters, flood, earthquake, life, pet, and umbrella—expanding how partners engage users across the financial lifecycle.

Why it matters to Engine partners

- **Unlock new revenue streams** through multi-line coverage and bundled policy recommendations
- **Drive higher conversion** with more accurate pricing, underwriting, and routing
- **Create ongoing engagement** through lifecycle triggers like renewals and savings opportunities
- **Activate cross-vertical journeys** by using insurance data to inform adjacent offers
- **Keep users in your experience** from discovery through fulfillment, enabled by Savvy's in-house agency

These benefits are underpinned by Trellis's adaptive, real-time underwriting and quoting, intelligent matching across carriers, and proprietary data built from millions of insurance shopping journeys—continuously optimized through testing and machine learning.

Easy to activate

Trellis integrates seamlessly into existing Engine implementations—via partner pages, embeds, SDKs, or APIs.

Reach out to your partner manager to get started.

Events

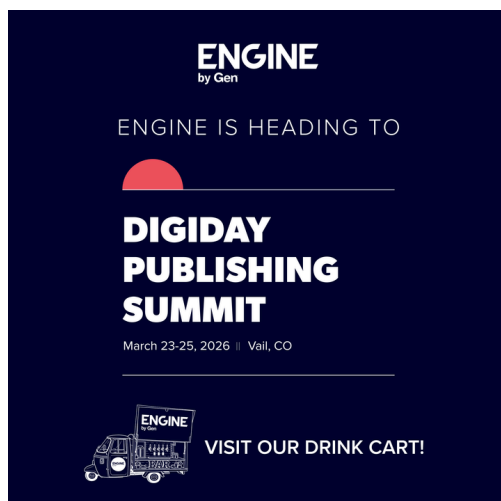
Banking CMO Summit and Fintech Meet Up March 29–31 | Las Vegas, NV

We are partnering with Fintech Meetup to launch the inaugural Banking CMO Summit, an invite-only gathering for senior marketing leaders from banks and financial institutions.

Through two focused panels, the Summit will explore how banks can earn consumer trust and act as wellness partners as more financial activity moves to digital channels, and how CMOs can translate data and AI-driven capabilities into practical engines for acquisition, engagement and measurable growth.

The Summit will also feature the announcement of the GOBankingRates Best Banks Awards winners, recognizing financial institutions setting the standard for consumer value and innovation.

[Learn more and request an invitation here — before it sells out!](#)



DidiDay Publishing Summit

March 23-25 | Vail, CO

We're looking forward to conversations about deepening engagement, unlocking revenue, and powering commerce and financial marketplaces within trusted content environments.

Watch for the Engine drink cart — a quick pick-me-up from our team!

[Book a meeting](#)

CardCon

April 21-23 | Phoenix, AZ

We're proud to take the stage at CardCon. Check out this panel featuring our very own Molly Gaines, GM of Credit Cards.

Beyond Rewards and Rates: The New Drivers of Credit Card Growth

Thursday, April 23, 9:30AM

[Book a meeting](#)

Webcasts

From Traffic to Trust: The Next Era of Card Acquisition

Tuesday, March 24, 2026 | 12pm - 1pm ET

Card acquisition is entering a new phase — shaped by smarter signals, contextual personalization, and a growing emphasis on quality over volume. This session brings together issuers and affiliate partners to explore how to cut through noise, meet compliance demands, and move consumers confidently from discovery to conversion.

Key topics include:

- Rethinking the true cost of acquisition and building a personalization strategy that actually moves the funnel.
- Strengthening issuer–affiliate alignment to balance quality and quantity, improve the Value vs. Premium mix, and build long-term growth.
- Navigating compliance while innovating, operating within tight regulatory parameters while still delivering accurate, responsible, and effective personalization.

Moderator: Jason Steele, Producer, CardCon

Speakers:

- Brooke Ray, SVP of Marketing and Advertising, Head of Affiliate Marketing, Citi
- Molly Gaines, GM, Credit Cards, Engine by Gen, CardCritics, LifeLock

[Register here](#)

Secure Financial Wellness

We are partnering with the Financial Times on a two-part webcast series exploring both the strategic and practical dimensions of secure financial wellness. The sessions will be moderated by FT U.S. Editor Antoine Gara and will feature C-suite executives from leading financial institutions with responsibilities across digital strategy, retail products, and marketing.

Part I: Building Trust to Drive Financial Services Growth **How secure financial wellness drives engagement, loyalty and long-term value**

Wednesday, April 22, 2026 | 10am-10:50am ET

Key topics include:

- How have digitally native consumer behaviours reshaped expectations of wealth-building and financial guidance?
- What does trust function as a measurable business driver — and not just a brand attribute?
- As fintechs raise the bar on experience and speed, where do traditional institutions retain structural advantages — and where does partnership accelerate trust, innovation, and time to market?
- How can security, transparency, and consumer control be designed into the core experience — rather than layered on as compliance features?
- In an AI-driven environment, how does trust become the gating factor for personalisation and growth?

[Register here](#)

Part II: Advancing Secure Financial Wellness Through AI **How digital platforms can use AI to support diverse financial goals while securing trust**

Wednesday, May 13, 2026 | 10am-10:50am ET

Key topics include:

- What does it take to move secure financial wellness from strategy to operating model?
- Where is AI already enabling secure financial wellness at scale?
- How does open banking shift the execution challenge of delivering secure financial wellness?
- How are data, security, and AI governance being operationalized — not just defined?
- How should organizations measure success when delivering secure financial wellness through AI?

[Register here](#)

Rethinking Acquisition and Engagement

MoneyLive and Engine are co-creating a mini series exploring how financial institutions are rethinking both customer acquisition and engagement as digital discovery and product journeys evolve. Across two sessions, marketing and product leaders will discuss how to attract the right customers, deepen relationships, and drive long-term value in a rapidly changing landscape. Both webcasts will be moderated by Lindley Gooden, author of *The Future of Truth (and How to Get There)*.

Part I: Rethinking consumer acquisition in the age of AI

Thursday, April 23, 2026 | 12pm-1pm ET

- The acquisition challenge: how evolving consumer behavior is reducing the effectiveness of traditional acquisition strategies
- Funnel compression: connecting customers to the most relevant product early in their financial journey through personalization
- Creativity at scale: building a real-time performance data feedback loop and moving away from “launch and pray”
- CAC optimization: applying AI to optimize channel mix and marketing spend efficiency

[Register here](#)

Part II: The future of consumer engagement

Tuesday, May 19, 2026 | 12pm-1pm ET

- Continuous personalization: moving beyond fixed segments toward experiences that adapt as customer needs evolve
- Conversational engagement: optimizing chat, in-app guidance, and digital assistance to reduce friction, answer questions in the moment, and support action without pressure
- Next-best-action orchestration: determining when to engage, how to engage, how to avoid message failure and when to hold back to increase impact
- Trust, relevance, and perceived value: understanding how contextual guidance strengthens credibility and builds long-term relationships

[Register here](#)

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