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BOOK
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SHAPING FUTURES

NATIONAL CONFERENCE

6-7 SEPTEMBER, 2018
PULLMAN HOTEL, AUCKLAND

Financial Services Council.
Growing and protecting the wealth of New Zealanders

Workplace
Savings NZ
Te māngai penapena ā-mahi

WELCOME

SHAPING FUTURES

NATIONAL CONFERENCE
6-7 SEPTEMBER, 2018

Welcome to the FSC & WSNZ national conference. It is a year of 'Shaping Futures' as we start to shape the future of our sector.

Our sector is undergoing rapid change and transformation. We are experiencing:

- significant growth in the investment and KiwSaver sector,
- a flat insurance market with significant M&A activity
- an advice sector on the cusp of major regulatory change

The national conference is the event of the year for the financial services and retirement savings industry. This full two-day programme aims to inspire and ignite great leadership, challenge the industry's thinking and build the resilience, motivation and knowledge we need to navigate change within the industry.

The conference is the showcase event of the year for the industry. It is a chance to:

- **Learn** – from the experts and your peers
- **Share** – in the collective expertise of our sector
- **Connect** – with your clients, colleagues, regulators and suppliers
- **Create** – lasting connections

Join us for the flagship event of the year; we look forward to seeing you in September.



David Biegel
Chairman
Workplace Savings NZ



Rob Flannagan
Chairman
Financial Services Council

SPONSORS & PARTNERS

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NATIONAL CONFERENCE
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We thank our sponsors for their generous support and we would like to acknowledge their contribution below. (Sponsors as at 17 April 2018.)

If you're interested in sponsorship, please call the FSC on (09) 985 5762.

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WORKPLACE SAVINGS AWARDS



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OUR STRATEGY

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The mission of both the Financial Services Council and Workplace Savings NZ is to be the 'the voice of the industry'.



POLICY AND ADVOCACY

Aim: To be the trusted voice of the financial services sector for the benefit of all New Zealanders.



INDUSTRY LEADERSHIP AND INSIGHT

Aim: Bringing the industry together with knowledge and insight for the benefit of all New Zealanders.



INDUSTRY BEST PRACTICE

Aim: Showcasing industry excellence in understanding, growing and protecting New Zealanders' wealth.



COMMUNITY OF PROFESSIONALS

Aim: A community developing itself to better understand and serve the needs of New Zealanders.



DEVELOPING A SUSTAINABLE BUSINESS

Aim: A sustainable business model delivering an effective and efficient industry body.



WHY ATTEND?

SHAPING FUTURES

NATIONAL CONFERENCE
6-7 SEPTEMBER, 2018

The financial services and retirement savings industry is undergoing a significant period of change. The 2018 conference programme will allow delegates to learn about global political changes, technological changes and regulatory changes from high profile and quality keynote speakers, whilst learning best practice from existing members.

The national conference is the event of the year for the sector, bringing together financial services business heads and strategy, operations and technology leaders.



Professional Development and Learning

- Great professional development content
- Gain CPD points
- Attend sessions targeted to your profession
- Hear from industry leaders on leading-edge topics
- Learn and network with peers



Connect with Your Community

- Meet your colleagues, clients, suppliers, regulators and community leaders
- Plenty of social and networking opportunities



Showcasing Excellence

- The exhibition centre will showcase best-of-breed suppliers
- Grow your business
- Learn from insightful leaders



Industry Marketplace

- Recognise excellence at the Awards Dinner
- Introducing new innovative awards this year



Celebrate

- Reflect on the continued success of the industry
- Join your colleagues and celebrate
- Social and networking programme

CONFERENCE ACADEMIC PROGRAMME

The 2018 conference will consist of a two-day, cutting-edge programme designed to inspire and educate delegates across the financial services industry.

MAIN PLATFORM PLENARIES



The draft programme allows for seven main plenary sessions, including the big speakers, panel debates, political insight and global challenges.

We aim to attract a range of big name speakers, both local and international, as well as thought-provoking industry panels.

WORKSHOP STREAMS

There will be four workshop sessions, consisting of three workshop streams:



Stream A - Investments
KiwiSaver / workplace savings and super



Stream B - Insurance
Insurance themes and trends



Stream C -
Consumer insights

WHY ATTEND?

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FEEDBACK FROM THE 2017 CONFERENCE

The Navigating Change conference, held on 7-8 September 2017 at the Hilton Hotel in Auckland, was attended by a total of **309 delegates**, of which over **30%** were female.

The target audience and delegates were largely from the financial services sector across New Zealand. Delegate numbers per category were as follows:



At Conference	Total
Delegate	202
Delegate / Speaker	44
Speakers	48
Media	5
Exhibition Staff	6
Staff	4
Total	309

The industry celebrated itself – keen to see these events grow.

At Conference	Average rating	%
Quality of presentations	4.18	83.53
Relevance of presentations	4.11	82.22
Coverage of topics	4.25	85.00
Meeting expectations	4.11	82.16
Total average	4.16	83.23



WHY ATTEND?

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FEEDBACK FROM THE 2017 CONFERENCE

Conference delegates overall thoroughly enjoyed the conference and many positive comments were received. In particular, delegates highlighted that the conference was an invaluable networking opportunity. Almost half of the survey evaluation comments spoke of the quality and breadth of the speakers and topics covered in the conference.

Both speakers and topics were praised for their variety and interest levels. The outstanding efforts, high quality and professionalism of the conference organisation were also a standout trend amongst the evaluation survey comments.

Top Four Trends	%
Breadth of topics	29
Great speakers	23
Networking	16
Conference organisation	11



WHO SHOULD ATTEND

Participants at the conference will come from all elements of the financial services industry:

- Trustees
- Business leaders
- KiwiSaver providers
- Insurance providers
- Fund managers
- Advisers and key dealer groups
- Senior product and marketing managers
- Service providers to the industry
- Fintech and insurtech providers
- Licensed Independent Trustees
- Reinsurers

MAIN PLATFORM PROGRAMME HIGHLIGHTS

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Industry leaders will explore key topics in the industry including financial services regulation, global politics, a changing client base, consumer technology, customer engagement and privacy, as well as fintech.

POLITICAL KEYNOTE SPEAKERS



HON GRANT ROBERTSON

Minister for Finance, Minister for Sport and Recreation
and Associate Minister for Arts, Culture and Heritage

Minister Robertson has been the Member of Parliament for Wellington Central since 2008. In Opposition, Grant was Finance Spokesperson, and has previously held spokesperson roles for Labour in Employment, Skills & Training, Economic Development, Tertiary Education, State Services, Health, and Arts, Culture & Heritage.

GUEST SPEAKER: JAKE BAILEY

‘STANDING ON THE SHOULDERS OF GIANTS’

When you sit in an audience to receive a speech, you do so with a distinct sense of resignation. Will I be entertained? Will I learn something? Will I manage not to shuffle if I find it just a little too long? There is also a sense of anticipation. One mustn't get too excited though, in case one is disappointed.

Nobody in the audience could have imagined how they would feel when the Head Boy of Christchurch Boys' High School interrupted proceedings, to be wheeled onto the stage of the school prize-giving on November 5 2015. He was emaciated, hollow eyed, exhausted and quite plainly, very, very ill. He was also however, contemplative and appreciative and you knew that when he looked to his peers he was looking to them for strength. He needed it for just the next 18 minutes.

He was fighting the battle of his life, yet when he was wheeled into his 'arena' he looked at that microphone as David would have Goliath. Jake Bailey was about to battle with the audience, but what was plain for all to see was that he was battling for his life.

What happened next was nothing short of inspirational. The world would soon learn what the audience did that night. They were experiencing just minutes out of their busy lives. But these minutes would rock them because they could see for themselves that they were minutes that were more precious than gold for this young man...

For more information, see Jake's website: www.jakebailey.co.nz



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MAIN PLATFORM PROGRAMME HIGHLIGHTS

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THE BIG ISSUES



BIG ISSUES SESSION

This session will explore the big issues globally and closer to home.

Experts will debate issues shaping the future of the world including:

- Geo-politics
- Economic landscape
- Demographics
- Prosperity

THE BIG DEBATE



IS TRUST THE NEW CURRENCY?

This debate will explore the importance of trust as a global mega-trend.

Experts will debate issues shaping the future of the world including:

- What does trust mean?
- Global trust measures
- How we use trust to drive change
- Ethics, conduct and consumers

PANEL DISCUSSION

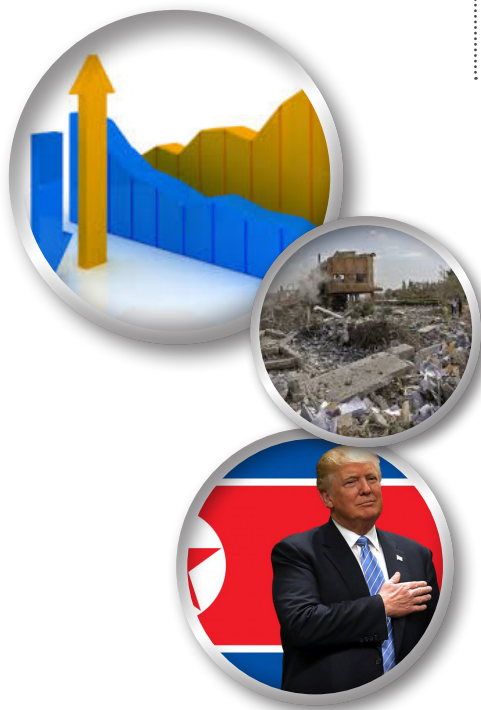


HOW WILL SMART ROBOTS, SMART CARS AND AI IMPACT THE INDUSTRY?

This debate will explore the future with a technological lens.

Experts will debate issues shaping the future of the world including:

- Technology
- Artificial intelligence
- Cyber risk
- Fraud



CONCURRENT WORKSHOP STREAMS

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Delegates can choose their topics from three different workstreams all covering important issues surrounding our industry.



INVESTMENTS

We're beyond FMCA transition and into business as usual but changes are afoot. How will the changes affect consumers and the products and services we offer? The investments stream gives you access to experts who will give you the good oil.

SESSION 1

Responsible investing – the shape of things to come

Consumer demand is up as more investors are putting their money where their morals are – but are ESG factors being integrated in all stages of the investment lifecycle? How is it translating into greater capital flows? Our panel will provide insights on the latest trends.

SESSION 2

Divestment and decumulation – planning for post-retirement

Kiwis are increasingly concerned about out-living their savings – but what products and services are available to help? With less room for error and less time to fix mistakes, savers need to plan for the spend phase carefully. In this session, we analyse current and emerging thinking.

SESSION 3

Restricted schemes – trade-offs and opportunities

We're post FMCA-transition and into BAU, so what's next? This forward looking session will consider member engagement and the role and opportunities for trustees. Our panel of industry experts will look at best practice governance and investment trade-offs, including simplicity versus a broadened investment base.

SESSION 4

KiwiSaver – how it's shaping up for consumers

Chat-bots, contribution rates, compulsion, and market drops – what's happening in the world of KiwiSaver? How are we trying to engage our members (and do we really need the KiwiFund Bill)? We'll put KiwiSaver under the microscope and talk about the key current issues and developments.



INSURANCE

Disruptors are challenging every part of the value chain. How are we as an industry fronting up to this challenge? How are we shaping our products and services to meet the evolving needs of our new world consumer? The insurance stream is your opportunity to see our panel of experts focus on the tough questions.

SESSION 1

Mental health – shifting mindsets

Given rising trends in mental health awareness and diagnosis, how is the industry responding to the challenge? How could we contribute to improving mental health outcomes? Our panel will discuss strategies from acceptance to engagement.

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SESSION 2

Insurance industry in 2023

2023 - How will the industry look once changes as diverse as the Insurance Contracts Act, new privacy laws and FSLAB have been implemented? Alongside technological and societal changes – we explore different facets of our industry's future.

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SESSION 3

Connecting better to consumers

Consumer needs, expectations and the real risks and financial challenges they face are changing. How do consumers increase their ability to engage with the industry? We consider these challenges and strategies to meet them.

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SESSION 4

Advice automation

What strategies will revolutionise customer engagement? How will technology change the delivery of financial advice? How willing are we to trust advice systems? We explore putting the client first in a world where technology, regulators and advice come together.



CONSUMER INSIGHTS

What influences consumer decisions? What cognitive biases cause consumers to make poor decisions? In a world of artificial intelligence and big data, companies are more able to customise consumer interactions than ever before. How can we help consumers make decisions that are in their best interests?

SESSION 1

Driving behaviours

How can behavioural economics be used to 'nudge' consumers into taking action and making important financial decisions they have been ignoring? How can 'nudges' be developed and measured? This session will outline an international framework, and provide numerous practical examples of how the regulators, industry providers and educators are using behavioural economics to drive better outcomes.

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SESSION 2

Personalising big data

There is an abundance of structured and unstructured data available to us. In this session, industry experts will outline how companies can use big data to better understand and develop marketing strategies personalised to their customers.

.....

SESSION 3

Financial education for young New Zealanders

We are often told New Zealanders have low levels of financial capability. Is this really the case? If so, what are we doing about it? Our panel of experts will discuss these issues and share experiences developing financial capability in our children and youth.

.....

SESSION 4

Financial services for millennials

As an industry, we can do better to help our young people discover additional ways to build and protect their wealth. From insurance to annuities, there is opportunity to broaden the conversation beyond KiwiSaver and housing. This session will discuss recent research findings into the needs, wants and aspirations of young adults, as well as some practical tips on how to develop and market products for them.

SOCIAL PROGRAMME

**SHAPING
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NATIONAL CONFERENCE
6-7 SEPTEMBER, 2018

FOR DELEGATES AND PARTNERS

Wednesday 5 September | 5.30pm – 6.30pm

Cocktails @ TBC

Board and Council cocktail function.
Invite only.



Thursday 6 September | 6.30pm – 12am

Gala Awards Dinner

Join us for our Bond-themed Gala Awards Dinner where we will recognise those doing excellent things within the industry.



BREAKFAST MASTERCLASSES – THURSDAY 6 SEPTEMBER

BREAKFAST MASTERCLASS 1



BREAKFAST MASTERCLASS 2



2018 AWARDS

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FINANCIAL SERVICES COUNCIL AWARDS

Celebrating success in the financial services industry, we're excited to bring you the FSC Awards. These awards showcase individuals who are truly making a difference for the financial services industry and the broader NZ community.

RISING STAR AWARD



For an individual who has shown tangible growth and development over the previous 12 months, making a real difference to the industry while early in their career.

INNOVATION AWARD



For an individual who has proactively taken the initiative to lift professionalism in the industry by addressing a big industry issue or industry challenge.

SHAPING THE FUTURE AWARD



For an individual who has consistently demonstrated industry leadership, proactively advocating for market change and a future focus.

DIVERSITY AWARD



For an individual who walks the talk when it comes to diversity. A person who is passionate about making a difference on any aspect of diversity both within and beyond the workplace.

WORKPLACE SAVINGS NZ AWARDS

The Excellence in Communication Awards celebrate and showcase excellence within the financial services industry. This is an opportunity for our members to learn and hear from each other and recognise those who are leaders in our changing industry.

PRODUCT DISCLOSURE STATEMENT (PDS) OF THE YEAR

- a) Corporate, master trust or industry super schemes; and
- b) KiwiSaver schemes.

Best product disclosure statement.

Sponsored by:

MOST INNOVATIVE COMMUNICATION

For the most inspiring communication in 2016/2017. A change that has made a true difference to consumers and the industry.

Sponsored by:

BEST OVERALL KIWISAVER MEMBER EXPERIENCE

For the best consumer experience on a KiwiSaver product, communication or service.

Sponsored by:

WORKPLACE SAVINGS EXCELLENCE IN COMMUNICATION

Overall winner demonstrating simple, easy-to-read, consumer-focused communication.

Sponsored by:



007TM

007

GALA DINNER & AWARDS

WHEN: 6.30PM ONWARDS, THURSDAY 6 SEPTEMBER

WHERE: CONFERENCE HALL, PULLMAN HOTEL

DRESS CODE: BOND, JAMES BOND

WITH A SPECIAL GUEST...

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ACCOMMODATION

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THE PULLMAN HOTEL, AUCKLAND

This 5-star, Qualmark-certified hotel is situated in the heart of the city opposite the historic Albert Park, and just a ten minute walk to SkyCity and Britomart.

Location: Corner Waterloo Quadrant and Princes Street, Auckland, 1010. Tel: (+64) 9 353 1000.

GUEST INFORMATION

PARKING

Limited valet parking is available at the hotel subject to availability for \$45 per day. Alternatively, all-day public parking is available at the Wilson Carpark nearby.

TRANSFERS FROM AIRPORT

You will be required to make your own way from the airport to the hotel. You can book this through **Corporate Cabs – 09 377 0773**.

GETTING AROUND AUCKLAND CITY

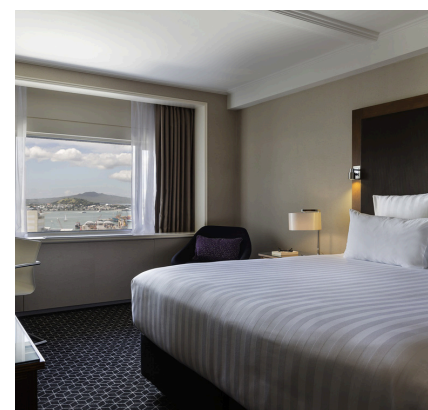
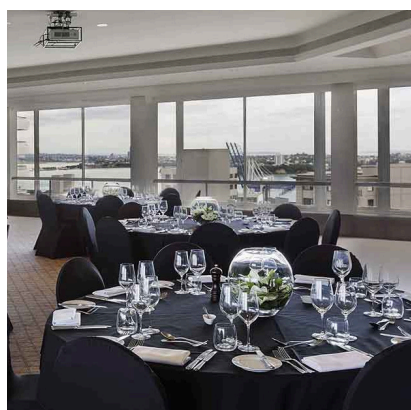
The Pullman Hotel is located close to Auckland's city centre. The ferry terminal is just a 10-minute walk away, as are all major bus routes.

EXTENDING YOUR STAY

The Pullman Hotel will provide all conference delegates with the conference room rate if they wish to extend their stay. Please contact the Pullman Hotel directly to arrange or extend your booking.

ROOM RATES

We have arranged an excellent room rate for delegates of **\$245 per night** (room only). Rooms are limited. You can reserve a room via the website www.shapingfutures.co.nz.



REGISTRATION

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This year you can register online with us. We look forward to seeing you at the conference.



REGISTER ONLINE @ www.shapingfutures.co.nz

Follow the prompts to the online registration.

Please contact us if you have any questions or require any assistance.

REGISTRATION FEES

FULL REGISTRATION FEE INCLUDES: admission to all conference sessions, access to the exhibition centre, choice of Breakfast Masterclass, all morning/afternoon teas and the Awards Dinner.

DAY REGISTRATION FEE INCLUDES: Admission to all conference sessions, access to the exhibition centre, choice of Breakfast Masterclass (Friday only), all morning/afternoon teas and lunches.

GROUP REGISTRATION FEE INCLUDES: Five or more members from the same organisation earn a discount off full registration fees.

- A minimum of five registrations must be received at one time from the same organisation
- Payment must be made by a single organisation cheque, online banking or credit card*
- Full payment of the registration fees must be submitted with the registration form

TICKET TYPE	EARLYBIRD RATE	AFTER 30 JUNE RATE
Member ticket	\$1,200	\$1,390
Non-member ticket	\$1,445	\$1,685
Daily pass	\$1,025	\$1,200
Half-day session	\$675	\$800
Dinner only	\$280	\$280
Dinner – table of x10	\$2,775	\$2,775

**BOOK
NOW!**

**OUR EARLYBIRD SPECIAL
RATE EXPIRES ON
30 JUNE 2018.**

*Only VISA & Mastercard accepted

Liability Disclaimer: The event organisers and their agents do not accept liability for errors or omissions which may appear in this brochure. To the best of our knowledge, comments were correct at the time of printing. The event organisers and their agents reserve the right to amend any part of the programme without notice. Such amendments may include substitutions or cancellations of speakers, social functions or tours. The event organisers accept no responsibility for the accuracy or content of any statement (whether written or oral made) by speakers at or in connection with the event.

Cancellation Policy: A refund of registration fees, less an administrative charge of \$150.00 (including GST) will only be available if written notification of your cancellation is received prior to 31 July 2018. No refunds after this date. Substitutions may be made at any time with written notice.

CONFERENCE TEAM

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NATIONAL CONFERENCE
6-7 SEPTEMBER, 2018

An event like this is only possible with the hard work and effort of a team. We thank the following people for their invaluable contribution in bringing the national conference to life.



Laura Abba



Mark Banicevich



David Biegel



Mark Daniels



Yvonne Davie



Jenn Dobinson



Rachel Douglas



Rob Flannagan



Russell Hutchinson



Richard Klipin



Ana-Marie Lockyer



Elaine Linnell



Tim McGuinness



Barry Read



Haydee Stroud



Vanja Thomas



Mike Woodbury

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REGISTER NOW!
EARLY BIRD SPECIALS NOW ON.

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