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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 Financial Services Council (FSC) and Workplace Savings NZ (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 KiwiSaver sector
- a flat insurance market with significant merger and acquisition activity
- an advice sector on the cusp of major regulatory change

The national conference is the showcase 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.

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.



Rob Flannagan
Chairman
Financial Services Council



David Biegel
Chairman
Workplace Savings NZ

SPONSORS AND PARTNERS

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NATIONAL CONFERENCE
6-7 SEPTEMBER, 2018

We thank our sponsors for their generous support and we would like to acknowledge their contribution below. If you're interested in sponsorship, please call the FSC on (09) 985 5762.

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The FSC and WSNZ are keen to nurture new players in edutech, fintech, insurtech and regtech. New for conference 2018 comes **TECH ALLEY**, a meeting place for the market.

Thank you to our Tech Alley participants for 2018.



BANQER



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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 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
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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
- Celebrate success with your peers



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 confirmed programme allows for seven main plenary sessions, including the big speakers, panel debates, political insight and global challenges. We have attracted 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
Themes and trends



Stream C -
Consumer insights

WHY ATTEND?

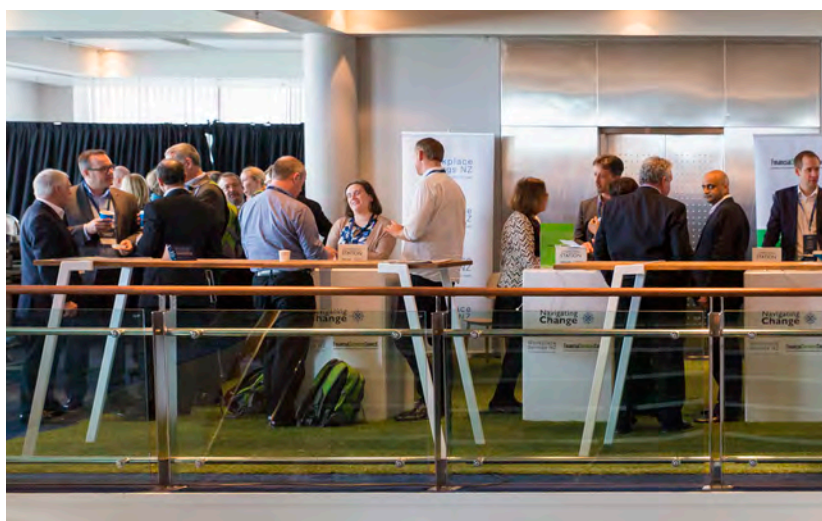
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FEEDBACK FROM THE 2017 CONFERENCE

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
- Supervisors
- 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.



HON KRIS FAAFOI

Hon Kris Faafoi was elected as the Member of Parliament for Mana in November 2010, following more than a decade working as a journalist at both TVNZ and the BBC. He is now the Minister for Civil Defence and Commerce and Consumer Affairs, as well as the Associate Immigration Minister.

In the area of Civil Defence, Kris has a strong vision for ensuring that both government and communities are prepared to look after each other in the event of a local or national emergency.

As the Minister of Commerce and Consumer Affairs, he's committed to ensuring the wheels of commerce move smoothly and that New Zealand capitalises on every advantage it can to grow our economy, jobs, wages and opportunities.

MINISTER FAAFOI WILL BE THE SPECIAL GUEST AT OUR GALA DINNER.

CORIN DANN

Corin started in the Political Editor role in May 2012 after a four and a half year stint hosting Business and Breakfast shows on TV One.

Prior to hosting the Breakfast and Business shows, Corin was TVNZ's Political Editor based in Parliament's Press Gallery.



MAIN PLATFORM PROGRAMME HIGHLIGHTS

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POLITICAL KEYNOTE SPEAKERS

AMY ADAMS

Spokesperson for Finance, National Party

Amy Adams was first elected to Parliament as the MP for Selwyn in 2008 and was re-elected by the voters of Selwyn in the following three elections.

Amy regained the seat of Selwyn in September 2014, receiving the largest majority in the country and joined National's front bench as the new Minister of Justice, Minister for Courts, Minister of Broadcasting and Minister for Communications. Following the portfolio reshuffle in December 2016, Amy retained the Justice and Courts portfolios and was also made Minister of Social Housing, Minister Responsible for Social Investment, Associate Finance Minister and Minister Responsible for Housing New Zealand.

With a change of Government following the 2017 election and a subsequent reshuffle in March 2018, Amy was elevated to be ranked number 3 in the caucus and was named National's finance spokesperson.



GUEST SPEAKERS



JAZZ THORNTON

Founder, Voices of Hope

The Financial Services Council and Workplace Savings NZ are proud to be supporting Voices of Hope with the annual national conference, Shaping Futures. Voices of Hope is a relatively new charity in New Zealand on a mission to provide hope for those struggling with mental health issues by promoting mental well-being, empowerment and recovery.

Voices of Hope was founded in 2014 by Genevieve Mora and Jazz Thornton. Both being mental illness survivors they felt the need to use their past experiences alongside their passion for creating content to provoke and bring change. They do this by creating videos that target mental illness issues as well as writing blog posts on different topics. Since the launch of Voices of Hope, their content has received both national and international recognition and has caught the attention of companies wanting to support their vision.



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GUEST SPEAKERS

THE BIG DEBATE: IS TRUST THE NEW CURRENCY?



ROB EVERETT

Chief Executive, Financial Markets Authority

Rob was appointed chief executive in November 2013 and joined the FMA in February 2014. Originally from the United Kingdom, Rob was previously a director with regulatory consultancy Promontory Financial Group. Before that he spent 17 years at Bank of America Merrill Lynch in Europe, Asia and North America.

Rob brings a truly global perspective to the leadership of the FMA and has experience in investment banking, legal and risk management.



THE BIG ISSUES DEBATE



ADRIAN ORR

Governor, Reserve Bank of New Zealand

Adrian was appointed Governor of the Reserve Bank of New Zealand in March 2018. Previously, he was Chief Executive Officer at the New Zealand Superannuation Fund. During his time there he won many awards including the Deloitte IPANZ Improving Performance through Leadership Excellence award in 2016, and Asian Investor's Individual Contribution to Institutional Investment Award in 2017.

Prior to that he was Deputy Governor and Head of Financial Stability for the Reserve Bank. Adrian has also held the positions of Chief Economist at Westpac Banking Corporation, Chief Manager of the Economics Department at the Reserve Bank and Chief Economist at The National Bank of New Zealand. He has also worked at the New Zealand Treasury and the OECD, based in Paris.



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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 5 November 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.

Parents were moved because they felt for Jake's parents (but thank goodness their own son was healthy), these same parents were however conflicted. They were also moved, because this boy on the precipice of adulthood displayed wisdom, strength, loyalty, courage and bravery that any parent would gladly have their own child display.

The students watched and were moved. They questioned their own dealings with this leader. Had they treated him well? Could they have made his life better? Could they behave better as a young man? Staff members on the stage were visibly upset. Could it be that they were to lose one of their own? This speech resonated not just because Jake Bailey was so ill, but that he spoke so powerfully.

We all strive to be someone like Jake Bailey. To have his mana. His courage. His fighting spirit. His insightfulness and wisdom. But most importantly – his humility. He encapsulates the good in what can be a very bad world and we owe it to him, no matter how old he is – to listen and to try to live our lives just a little bit better.

Jake would be the first to tell you that nothing in life is certain, but one thing quite categorically is: Jake Bailey has a gift for making us want to be better human beings simply by telling his story.

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 DEBATE: IS TRUST THE NEW CURRENCY?



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

Our all-star panel 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



Corin Dann
Q&A Host, TVNZ
FACILITATOR



Rob Everett
CEO, FMA



Damien Mu
CEO, AIA Australia & NZ

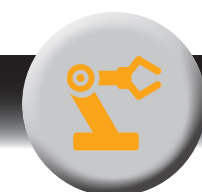


Rob Flannagan
Chairman, FSC



Ana-Marie Lockyer
ANZ

FINTECH, AI AND CYBER THREATS



How will fintech, AI and cyber threats transform the sector, and what to do about it.

- The emerging fintech sector, including fintech, edutech, insurtech and regtech
- The trends driving customer changes
- What impact is this having on the sector – is this driving M&A?
- What are the big developments in AI and what's happening in NZ in this regard
- What are the biggest themes in the AI sector?
- What are the opportunities and what are the biggest areas of threat in the sector?



Jeremy Muir
Partner, Minter Ellison
FACILITATOR



Geoff Ward Marshall
Lawyer, DLA Piper



Brooke Roberts
Founder, Sharesies



Andy Symon
Financial Services, PwC



Tim Warren
COO, Ambit

MAIN PLATFORM PROGRAMME HIGHLIGHTS

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THE 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



Tova O'Brien
Political Editor, Newshub
FACILITATOR



Adrian Orr
Governor,
Reserve Bank of NZ



Naomi Ballantyne
Managing Director,
Partners Life



Kirk Hope
CEO, BusinessNZ



Laurence Kubiak
CEO, NZIER

**NEW
FOR
2018!**

ADVICE FORUM

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DEALER GROUP EXECUTIVE AND ADVICE FORUM

'WHAT'S KEEPING YOU UP AT NIGHT?'

EXCLUSIVE ROUNDTABLE WITH SENIOR FMA LEADERS

Thursday 6 September | 1pm - 1.45pm

PURPOSE

The New Zealand market is on the cusp of major regulatory change.

This will impact all players in the market and, whilst not all decisions are known, the broad focus and strategic intent is clear.

This programme is focused on dealer group executives considering their options. You will meet, hear and engage with key decision makers in the industry helping to lead the change.

Engage and continue discussion with dealer group CEOs and senior leaders:

- Have your voice heard and open 'in camera' discussion
- An opportunity to have an open discussion on the state of the market and regulation
- Discuss the implications of the Royal Commission and insights here in NZ
- Help to facilitate this discussion



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PANELLISTS



JOHN BOTICA, FMA

DIRECTOR OF MARKET ENGAGEMENT

John is an experienced senior executive, director and consultant in the financial services industry.

He was co-founder of the Assure NZ Group, Managing Director at Guardian Trust and General Manager Wealth Management at AXA.



LIAM MASON, FMA

DIRECTOR OF REGULATION

Liam leads and oversees the licensing and supervision of all financial markets participants, from individual AFAs through to KiwiSaver providers. He is also responsible for the FMA's compliance frameworks, contacts, and intelligence functions.

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 outliving 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.

.....

SESSION 2

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.

.....

SESSION 3

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.

.....

SESSION 4

Insurance 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.

SESSION 2

Personalising big data

There is an abundance of structured and unstructured data available to us. We're all aware of the opportunity and, of course, the challenges of truly leveraging this. In this session, industry experts from IBM, Salesforce and Touchpoint will give practical examples of how our industry is using big data to better understand customers and develop tailored experiences.

SESSION 3

Headwinds and Tailwinds for Retirees of the Future

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

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FOR DELEGATES AND CONFERENCE PARTNERS

Wednesday 5 September | 5.30pm – 6.30pm
Cocktails @ TBC

FSC Board and WSNZ Council cocktail function.
Invitation 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 | 7.15am – 8.30am

BREAKFAST MASTERCLASS 1

PITCH PERFECT

at Tech Alley



Come and join Tech Alley and pitch your offer... Five organisations will have five minutes each to pitch their product. The best pitch (voted) will get a 10-minute spotlight session on the main platform.

Directly connect with FSC and WSNZ members

Take the opportunity to get your ideas in front of the heavy hitters! A great way to build partnerships and to generally spread the word about your business.

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BREAKFAST MASTERCLASS 2

WOMEN IN LEADERSHIP

**WOMAN AND MACHINE –
RESILIENCE FOR A NEW WAY
OF WORKING TOGETHER.**

with Kerri McMaster



Start your conference with amazing insights from Kerri McMaster, co-founder and chief strategy officer of Performance Lab Technologies Ltd.

As a founder of her own AI business, Kerri will discuss how AI is shaping the future of diversity and employment for women in the tech sector and the need for resilience in these changing times.








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CONFERENCE PROGRAMME

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DAY ONE – THURSDAY 6 SEPTEMBER

TIME	SESSION TOPIC	SESSION DETAILS
7.15 – 8.30am	BREAKFAST MASTERCLASS #1	Tech Alley Breakfast
7.15 – 8.30am	BREAKFAST MASTERCLASS #2	Women in Leadership Breakfast
7.30 – 9.00am	Registration and expo open	Pullman Hotel
9.00 – 9.30am	Opening and welcome	
9.30 – 10.15am	 MAIN PLATFORM 'New Zealand's place in the world'	Corin Dann in conversation with Hon. Grant Robertson
10.15 – 11.15am	ROB EVERETT , CEO of the Financial Markets Authority  MAIN PLATFORM Panel 1 – Is trust the new currency?	Panel discussion led by Corin Dann with Rob Everett, Rob Flannagan, Ana-Marie Lockyer, Damien Mu
11.15 – 11.45am	Morning Tea	
11.45 – 12pm	 SPOTLIGHT SERIES	Winner of Tech Alley Pitch Perfect
12.00 – 12.45pm	 MAIN PLATFORM Panel 2 – How will fintech, AI and cyber threats transform the sector, and what to do about it.	Panel discussion led by Jeremy Muir with Geoff Ward Marshall, Brooke Roberts, Andy Symon, Tim Warren
12.45 – 1.30pm	Lunch	
1.30 – 2.15pm	Workshop – Session 1 – Investment Responsible investing – the shape of things to come	 Discussion with Katie Beith, John Berry, Matt Mimms, Rebekah Swan
1.30 – 2.15pm	Workshop – Session 1 – Insurance Mental health – shifting mindsets How is the industry responding to the challenge?	 Discussion with Shelley Cox, Fiona Knight, Jacqui Maguire, Aych McArdle
1.30 – 2.15pm	Workshop – Session 1 – Consumer Insights Driving behaviours – Which strategies will revolutionise customer engagement?	 Discussion with Gillian Boyes, Marcos Pelenur

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DAY ONE – THURSDAY 6 SEPTEMBER

TIME	SESSION TOPIC	SESSION DETAILS
2.25 – 3.15pm	Workshop – Session 2 – Investment Divestment and decumulation - Planning for post-retirement	 Discussion with David Boyle, Wade Matterson, Ralph Stewart, Susan St John
2.25 – 3.15pm	Workshop – Session 2 – Insurance Connecting better to consumers - Who aren't we talking to? How are we evolving to meet new needs?	 Discussion with Mark Daniels, Gareth Parry, Peter Sobels, Susan Taylor, Jenée Tibshraeny
2.25 – 3.15pm	Workshop – Session 2 – Consumer Insights Personalising big data – How analysing big data can be used to understand consumers and target marketing activity	 Discussion with Ritesh Bisoi, Shahid Saiyad, Stuart Ward
3.15 – 3.45pm	Afternoon Tea	
3.45 – 4.00pm	 SPOTLIGHT SERIES Closing the gap – KiwiSaver launch	
4.00 – 4.30pm	 MAIN PLATFORM 'Standing on the Shoulders of Giants'	Jake Bailey
4.30 – 4.45pm	Day One closing remarks	
6.30 – 7.15pm	Pre-dinner drinks	Pullman Hotel
7.00 – midnight	 GALA DINNER with special guest Minister Kris Faafoi Hosted by David Boyle 	

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DAY TWO – FRIDAY 7 SEPTEMBER

TIME	SESSION TOPIC	SESSION DETAILS
8.00 – 8.45am	Networking, coffee and breakfast	Exhibition Centre
8.45 – 9.00am	Day two welcome	
9.00 – 09.30am	 MAIN PLATFORM 'New Zealand's place in the world'	In conversation with Amy Adams
9.30 – 10.30am	ADRIAN ORR , Governor, Reserve Bank of New Zealand  MAIN PLATFORM Panel 3 – Big Issues session	Panel discussion led by Tova O'Brien with Adrian Orr, Naomi Ballantyne, Kirk Hope, Laurence Kubiak
10.30 – 10.45am	 SPOTLIGHT SERIES	
10.45 – 11.15am	Morning Tea	
11.15 – 12.00pm	Workshop – Session 3 – Investment Restricted schemes – Trade-offs, opportunities and ship-shape governance 	Discussion with Tim McGuinness, Gavin Quigan, Bernard Reid, Mike Woodbury
11.15 – 12.00pm	Workshop – Session 3 – Insurance Insurance industry in 2023 – How do consumers increase their ability to engage with the industry and have greater confidence in their choices 	Discussion with Russell Hutchinson, Philip Macalister, Jaime Monaghan, Roy Norris, Barry Read
11.15 – 12.00pm	Workshop – Session 3 – Consumer Insights Headwinds and Tailwinds for Retirees of the Future 	Discussion with Diane Maxwell

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DAY TWO – FRIDAY 7 SEPTEMBER

TIME	SESSION TOPIC	SESSION DETAILS
12.10 – 12.55pm	Workshop – Session 4 – Investment KiwiSaver – How it's shaping up for consumers Including KiwiFund Bill, engagement, disclosure 	Discussion with David Beattie, Joe Bishop, Tamsyn Parker, Therese Singleton
12.10 – 12.55pm	Workshop – Session 4 – Insurance Advice automation – How is the industry responding to the challenge? 	Discussion with Mark Daniels, Justin Mercer, Eduard Liebenberger
12.10 – 12.55pm	Workshop – Session 4 – Consumer Insights Financial services for millennials – Insights from FSC Research: Generation KiwiSaver 	Discussion with Matthew Pickering, David Wallace
12.55 – 1.25pm	 MAIN PLATFORM – Voices of Hope	Jazz Thornton
1.25 – 1.40pm	End of conference closing remarks	Mike Woodbury, Chapman Tripp
1.40pm	Lunch and networking	

2018 AWARDS

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FUTURES**
NATIONAL CONFERENCE
6-7 SEPTEMBER, 2018

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 2017/2018. 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: 



007[™]

007

GALA DINNER & AWARDS

WHEN: 6.30PM ONWARDS, THURSDAY 6 SEPTEMBER

WHERE: CONFERENCE HALL, PULLMAN HOTEL

DRESS CODE: BOND, JAMES BOND

WITH SPECIAL GUEST KRIS FAAFOI



SPONSORED BY
**CHAPMAN
TRIPP**



ACCOMMODATION

**SHAPING
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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

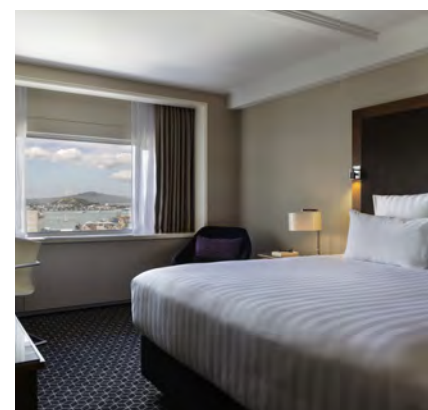
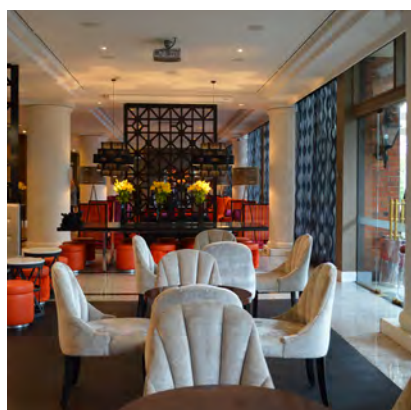
The Pullman Hotel is located close to Auckland's city centre. The ferry terminal is just a 10-minute walk away, as are all major bus routes.

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 **\$295 per night** (room only). Rooms are limited. You can reserve a room via the website www.shapingfutures.co.nz



REGISTRATION

**SHAPING
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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 (Thursday 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	\$2,575	\$2,775

**BOOK
NOW!**

**‘WOMEN IN LEADERSHIP’
MASTERCLASS
BREAKFAST
TICKETS NOW AVAILABLE**

*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

**SHAPING
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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



David Bishop



Joe Bishop



Mark Daniels



Yvonne Davie



Jenn Dobinson



Rachel Douglas



Rob Flannagan



Russell Hutchinson



Richard Klipin



Elaine Linnell



Ana-Marie Lockyer



Sarah McBride



Tim McGuinness



Barry Read



Haydee Stroud



Vanja Thomas



Mike Woodbury

**'WOMEN IN
LEADERSHIP'
BREAKFAST
TICKETS NOW
AVAILABLE**

SHAPING FUTURES

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REGISTER NOW!

For Conference or Membership enquiries:

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www.shapingfutures.co.nz

The conference has been assessed
for CPD accreditation.