

NAME:

BE *inspired
energised*

**FINANCIAL ADVICE NZ
CONFERENCE
BOOKLET**

Financial Advice
NEW ZEALAND

CR
Curated Risk

THANKS TO OUR SPONSORS

Platinum



Gold



HEALTHIER, LONGER,
BETTER LIVES



Consilium



Marsh

Bronze



Asteron
Life



Generate



Quotemonster

SALT



General



MASSEY
BUSINESS
SCHOOL



OMNIMax™



resimac

Sharesies



Strategi
Compliance

Strategi
Institute

Nearly 40% of
kiwis turned down
for a home loan
don't know there's
an alternative*.

With Pepper Money,
it can be you.

Find out more
adviser.peppermoney.co.nz
0800 945 658

peppermoney

Real life loans for real life people.

Important Information: All applications are subject to Pepper Money credit assessment and suitability criteria. Terms, conditions, fees and charges apply. Credit provided by Pepper New Zealand Limited (NZBN 9429031065153), trading as Pepper Money. *Pepper Money (2019). Taking the local pulse: Understanding New Zealand home loan applicants. A research report. String Theory Research New Zealand 2019.

CONTENTS

01 GENERAL
INFORMATION
6

02 CONFERENCE
WELCOME
7 - 8

03 PROGRAMME
9 - 12

04 KEYNOTE SPEAKERS
13 - 19

05 LIGHTNING SESSIONS
21 - 23

06 CONCURRENT BUSINESS
SESSIONS
25 - 29

07 CONCURRENT
TOOLS FOR YOU SESSIONS
31 - 35

08 FIRESIDE CHAT
37 - 38

01 GENERAL INFORMATION

THE ONLINE CONFERENCE PLATFORM

Link: www.financialadvice.nz/onlineconference

The easy to use online conference platform provides everything you need to get the most from your conference experience. View the programme, watch live streaming sessions, download content and resources, connect with other delegates and sponsors, and more. Refer to the Participant Guide emailed to you prior to the conference for instructions and troubleshooting help.

CONTINUING PROFESSIONAL DEVELOPMENT (CPD HOURS)

Up to 12 structured CPD hours are available to attendees.

LIABILITY

In the event of any disruption or event leading to losses or added expenses being incurred in respect of the Conference, there shall be no liability attached to Financial Advice New Zealand, the Organising Committee, or The Conference Team. The programme is correct at time of printing; however the Organising Committee reserves the right to amend any component as necessary.

TECHNICAL ASSISTANCE AND INFORMATION

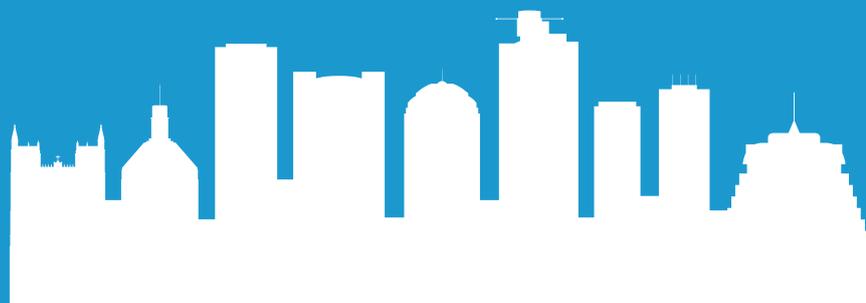
Our Conference Team will be available to assist you with any questions you may have regarding the online platform and programme.

Alton 027 537 3542, alton@conferenceteam.co.nz

Marg 0274 359 578, marg@conferenceteam.co.nz

02

CONFERENCE WELCOME





SUE BROWN

Chair

It is my great pleasure to welcome you to the 2021 Financial Advice New Zealand Conference.

This has been a year of change and uncertainty, as both new legislation and the impacts of COVID-19 have forced us to be agile in adapting to the new business environment we now operate in.

The 'Be Inspired, Be Energised' conference has been no exception, as we have had to move swiftly from planning an in-person event to delivering a new online only conference which offers a high-value, interactive, virtual experience for all involved.

I am so proud and excited for Financial Advice NZ to be able to take the lead in our sector, in introducing you to a 'new era in conferencing.' Our online platform allows you to tailor your conference experience - attend sessions of your choice, freely network with sponsors and your peers, attend live Q&A and chat sessions, and access all of the content, tools and resources you need at your fingertips.

We have a truly inspiring and energising line-up of International and New Zealand presenters; this is a programme packed with key insights and practical tools for all advisers.

As we near the end of a very eventful and whirlwind year, it's important you make the most of everything this conference has to offer, to end your year on a high-note, and set yourself up for a successful 2022 - whatever that may bring!

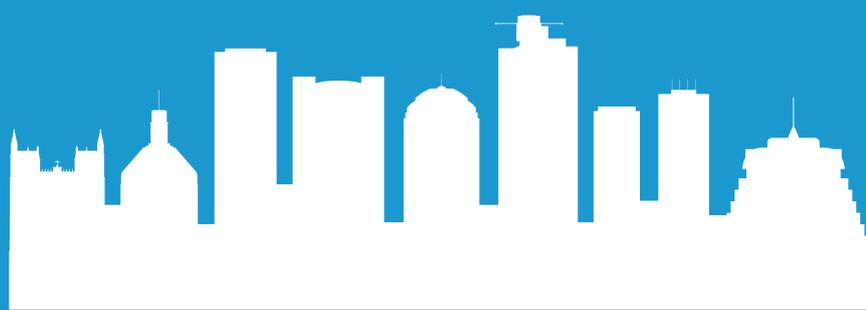
I encourage you to take a look around the conference platform early to familiarise yourself with all of the features, and plan your own personalised conference experience - refer to the Participant Guide to help get you started.

I hope you enjoy the next two days. Get involved, be inspired, be energised!

Sue Brown

03

PROGRAMME



MONDAY 15TH NOVEMBER

3.00pm Financial Advice New Zealand Annual General Meeting

TUESDAY 16TH NOVEMBER

9.00am Welcome from Katrina Shanks CEO and Andrew Patterson MC

Hon. David Clark Minister of Commerce & Consumer Affairs, the Digital Economy & Communications, State Owned Enterprises, and Statistics, Minister Responsible for the Earthquake Commission (see page 14)

9.30am **International Keynote: The Great Transformation – A rollercoaster tour across the frontiers of technological disruption.**
Future Crunch, Dr Angus Hervey & Tané Hunter, Australia (see page 15)

10.35am MORNING TEA sponsored by  riskinfoNZ

10.45am **Keynote: Economic Update - Sharon Zollner, ANZ Economist (see page 16)**

11.20am Financial Advice NZ Chair Update - Sue Brown

11.40am Financial Advice 2021 Gala Awards announced (see page 12)

12.05pm Launch of the 2021 Retirement Expenditure Guidelines - Scott Alman and Katrina Shanks

12.40pm LUNCH sponsored by  resimac
Fireside Chat: visit the FPSB and FMA chat rooms (see page 37 for details)

1.05pm **International Keynote: Black Sheep Rising – How to win at work (and life) by breaking all the rules.**
Mykel Dixon, Australia (see page 17)

2.10pm Lightning Sessions (see page 21)
In this fast-paced session we will have four leaders provide a snapshot of their business success and challenges, and their vision for the future:
Ben Tuese - CEO, Habit Group
Sam Johnson - Student Army, Building Movements that Matter

3.10pm AFTERNOON TEA Sponsored by  riskinfoNZ

3.25pm Lightning Sessions continued
Sonya Williams - Co-founder, director and Co-CEO of Sharesies
Steve Korner - Co-founder and CEO, Method Recycling

4.20pm Day closes

WEDNESDAY 17TH NOVEMBER

9.00am Welcome - Katrina Shanks, CEO and Andrew Patterson, MC

9.05am **International Keynote: Amplifiers – The Power of Motivational Leadership to Inspire and Influence.**
 Matt Church, Australia (see page 18)

10.40am MORNING TEA Sponsored by 

10.55am Concurrent 'Tools for your Business' sessions (see page 25)

Delivering Consistently Superior Customer Service <i>John Spence, Global Business Expert and Executive Coach, USA</i>	Applying Behavioural Finance in Principle <i>Michael Kitces, Financial Planning Educator, USA</i> Sponsored by 
--	--

12.05pm

Ferociously Creating a High-Performance Team Culture <i>Michael Henderson, Business Culture Subject Matter Expert</i>	Demographic Change and the Impact on the Face of New Zealand <i>Prof Paul Spoonley, Demographer, former Pro Vice-Chancellor of the College of Humanities and Social Sciences at Massey University</i> Sponsored by 
--	---

13.10pm LUNCH Sponsored by  making sense of money

Fireside Chat: visit the FMA and The Board chat rooms (see page 37 for details)

1.40pm Concurrent 'Tools for You' sessions (see page 31)

The Secrets of High Performers <i>Chelsea Lane, Golden State Warriors Head Performance Therapist</i>	Bounce Forward Fast – How resilience fails and how to bounce forward fast <i>Dr Sven Hansen, The Resilience Institute</i> Sponsored by  HEALTHIER, LONGER, BETTER LIVES
---	--

2.50pm

Goals That you Actually Want: clarity on what really matters, eliminating what doesn't <i>Dr Sarah Ferguson, Director, Breathe Repeat</i>	Check Body, Check Emotion, Check Mind – How to be fully present and engaged when it matters <i>Dr Sven Hansen, The Resilience Institute</i> Sponsored by  HEALTHIER, LONGER, BETTER LIVES
--	--

3.55pm **Keynote: New Zealander of the Year Dr Siouxsie Wiles (see page 19)**
 Sponsored by 

4.50pm Conference close

FINANCIAL ADVICE NEW ZEALAND 2021 GALA AWARDS

Join us at 11.40am on Tuesday as we recognise the outstanding work of New Zealand's financial advisers and support staff in regard to their service to the profession, their clients, and the wider community.



Service to the Profession Award

Recognising an individual who has made an outstanding contribution to the Financial Services sector and has gone above and beyond to champion for or to enhance the profession.



Outstanding Adviser Award

Recognising our members who help New Zealanders achieve financial wellbeing through providing an outstanding financial advice service and who exhibit professional excellence.



Rising Star Award

Recognising the brightest new talent in advice amongst our members in their chosen field of financial advice by demonstrating that they provide high quality financial advice, deliver an exceptional client experience and show commitment to their professional and personal development.



Outstanding Support Person Award

The most Outstanding Support Person recognised by our members who demonstrates an exceptional adviser support experience and shows ongoing commitment to the financial services sector.



Community Service Award

Recognising our members who have made a meaningful and positive impact to the lives of people in our communities in respect of financial wellbeing.

Tate Scholarship

CFP^{CM} professionals meet rigorous education and training standards, and are committed to serving their clients' best interests today to prepare them for a more secure tomorrow. To encourage and support advisers in achieving this standard of excellence, the Tate Scholarship of \$5,000 will be awarded to an adviser who has been granted CFP certification.

Financial Advice NZ would like to thank Nigel Tate of Nigel Tate Financial Planning for this generous scholarship. Nigel, a CFP professional himself, is committed to the highest professional standards in financial advice. He works hard for the profession and is an advocate for the future of quality financial advice in New Zealand.

CFP^{CM} and  are registered certification marks and CERTIFIED FINANCIAL PLANNER^{CM} is a common law certification mark owned outside the U.S. by Financial Planning Standards Board Ltd. Financial Advice New Zealand Inc is the marks licensing authority for the CFP Marks in New Zealand, through agreement with FPSB.

CLU^{CM} and  are registered certification marks and Certified Life Underwriter^{CM} is a common law certification mark owned by Financial Advice New Zealand Inc for use in financial services sector in New Zealand.

TATE SCHOLARSHIP

RECOGNISING NEW
CFP PROFESSIONALS

KEYNOTE SPEAKERS

Conference Opening

Hon. David Clark, Minister of Commerce & Consumer Affairs
Tuesday, 9.00am

Topic: The Great Transformation – A rollercoaster tour across the frontiers of technological disruption.

By Future Crunch, Dr Angus Hervey & Tane Hunter, Australia
Tuesday, 9.30am

Topic: Economic Update

By Sharon Zollner, ANZ Economist
Tuesday, 10.45am

Topic: Black Sheep Rising – How to win at work (and life) by breaking all the rules.
by Mykel Dixon, Transformational Speaker, Australia

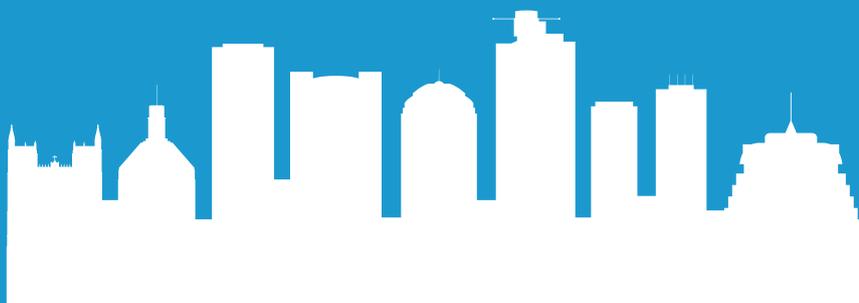
Tuesday, 1.05pm

Topic: Amplifiers – The Power of Motivational Leadership to Inspire and Influence

Matt Church, Motivational Speaker and Leadership Expert, Australia
Wednesday, 9.05am

Dr Siouxsie Wiles, New Zealander of the Year

Wednesday, 3.55pm





Master of Ceremonies Andrew Patterson

Andrew is a passionate business champion, an experienced speaker, MC and freelance business writer and correspondent.

Andrew has previously worked in media roles in New Zealand for the National Business Review and also Mediaworks as well as in Australia as part of the Australian Broadcasting Corporation's continuous news network, ABC NewsRadio.

During the course of his media career Andrew has travelled to 55 countries and interviewed more than 1,000 business leaders and other high profile guests including authors Malcolm Gladwell and Simon Sinek, Nobel Peace Prize Winner Muhammad Yunus, New York Times columnist and author Thomas Friedman and renowned economic historian Niall Ferguson.



Conference Opening Hon. David Clark

Tuesday, 9.00am

Hon Dr David Clark was first elected as the Labour Member of Parliament for Dunedin North in 2011. He came to Parliament after having run a University of Otago residential college, worked as a Presbyterian Minister, and worked as a Treasury analyst.

David is Minister of Commerce and Consumer Affairs, Minister for the Digital Economy and Communications, Minister for State Owned Enterprises and Minister of Statistics. He is also the Minister Responsible for the Earthquake Commission.

One of the key reasons David stood for Parliament was because he was concerned about the growing gap between rich and poor, which he sees as limiting New Zealand's social and economic potential. Inequality featured strongly in his maiden address to the House of Representatives in 2012. He believes we can, and must, achieve a fairer society where everyone has an opportunity to succeed.

David has twice lived in Germany and is a former competitive athlete and Ironman. He is married with three children.



The Great Transformation – A rollercoaster tour across the frontiers of technological disruption.

Future Crunch, Dr Angus Hervey and Tané Hunter

Tuesday, 9.30am

Connectivity, digital disruption, machine learning and artificial intelligence, intuitive computing, automation, additive manufacturing, decarbonization, regeneration, gene-editing, synthetic biology, brain-machine interfacing. Each of these are transformative in their own right. Together, they're a roaring tornado sweeping across the global economy. History is full of tumultuous moments like this, inflection points that represent a gateway between one world and the next. There are different names, different ideas, for what lies on the other side. "The fourth industrial revolution" or "the next economy" For us, it's even bigger. We call it "The Great Transformation" – a once in 100-year upheaval in every industry at once.

Understanding the drivers of this transformation is essential for any organisation wishing to navigate the rapidly changing operating environment of the 21st century. Audiences will come away from this talk with the ability to think clearly and critically about technological disruption – a skill that's particularly relevant for leaders who wish to maintain a strategic advantage and protect their organisations against competitors looking to do the same.

Dr Angus Hervey is a political economist and Tané Hunter is a cancer researcher and science communicator. Both are founders of Future Crunch, an organisation that helps people understand what's on the frontiers of science and technology, and how the world is changing for the better.





Black Sheep Rising – How to win at work (and life) by breaking all the rules.

Mykel Dixon, Australia

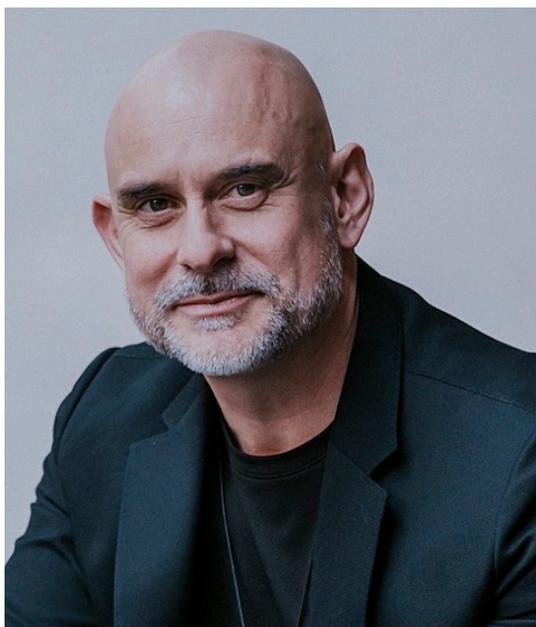
Tuesday 1.05pm

When did work get so ... boring. Compliance, regulation, assessment. Don't step on the grass, don't colour outside the lines, don't speak unless you're spoken to. Is it any wonder we're in the midst of a global Creativity Crisis? We're all so focused on filling in, ticking boxes and getting approved that we've lost our ability to express ourselves. If we're to meet the pace of change, deliver unique value, and build workplaces that ignite the full potential of our people, we need to shake the tree.

Named Australia's Breakthrough Speaker of the Year, and the author of 'Everyday Creative – a dangerous guide to making magic at work', Mykel Dixon leads a new wave of entrepreneurial savants showing fortune 500 and ASX 200 listed companies how to stay relevant in a 21st-Century Renaissance.

A jazz musician by trade, gypsy by nature, fierce non-conformist & prolific anti-perfectionist, his live-learning experiences unite teams, ignite creativity and infuse participants with the skills they need to solve complex 21st-century business challenges. Blending his unique life & business experience, a bias for action and a magnetic stage presence, Mykel's highly interactive keynotes and conference and event offerings are powerful, poetic and full of possibility. His use of live music, spoken word poetry, visual storytelling and audience participation gives him an unmistakable edge.





Amplifiers – The Power of Motivational Leadership to Inspire and Influence

Matt Church

Wednesday 9.05am

Organisations that succeed have leaders and teams that are inspired by what they do and what their work stands for. Matt Church unpacks the process by which transformational leaders can amplify their impact, productivity, creativity, and results. Your amplified leaders will become masters of maximising human potential and developing other great leaders among their colleagues. This presentation will show your leadership teams how to:

- master the essential communication tools for making an impact
- bring out the best in people and maximise their impact
- employ positive tactics that inspire others to achieve the unimaginable
- create work worth doing and cultures worth belonging to
- become leaders worth following.

Matt is a seeker of truth, sharing his learning through teaching and writing. As the founder of Thought Leaders and a highly respected conference presenter, he communicates, connects and challenges audiences and himself to be the best version of themselves. He invites all leaders to expand their view of what is and find true inspiration. Highly intuitive, he experiences much of life beyond the observable and explainable. His ability to make the complex simple and the way forward clear has him speaking all over the world. Grounding big ideas in practical perspectives, the evolution of his thinking can be traced through the 11 books he has written. Always one to draw a line in the sand, his latest book 'Rise Up; an evolution in leadership' represents the next level for Matt, as he turns inwards to understand and apply age old wisdom to leadership.



Dr Siouxsie Wiles

New Zealander of the Year 2021

Wednesday 3.55pm

Dr Siouxsie Wiles MNZM is an award-winning scientist who has made a career of manipulating microbes. Her day job is university lecturer and head of the Bioluminescent Superbugs Lab where she and her team make nasty bacteria glow in the dark to find new medicines. But Siouxsie also has a passion for demystifying science, and she was doing this long before the pandemic. So much so that in 2019 she was appointed a member of the New Zealand Order of Merit for services to microbiology and science communication.

When the pandemic arrived, Siouxsie joined forces with Spinoff cartoonist Toby Morris to make the science of the pandemic clear and understandable. Their graphics have been translated into multiple languages and adapted by various governments and organisations.

In her presentation, Siouxsie will reflect on what she's learned about COVID-19, science communication, and leadership during this extraordinary time in our lives.

Siouxsie has been recognised many times for her amazing contributions to science and society in New Zealand. In 2019 she was made a member of the New Zealand Order of Merit, for services to microbiology and science communication. Prior to this, she had been honoured as a Blake Leader by the Sir Peter Blake Trust as well as winning both the Royal Society Te Aparangi Callaghan Medal and the Prime Minister's Science Media Communication Prize. Most recently, during the COVID-19 pandemic, Siouxsie became one of the primary faces, communicators and educators in NZ, helping ease the public's anxiety through lockdown and beyond. This led to Siouxsie being named the supreme winner of the Stuff-Westpac Women of Influence Awards 2020.

Sponsored by Pepper Money

peppermoney



05

LIGHTNING SESSIONS

In this fast-paced session we will have four leaders provide a snapshot of their business success and challenges, and their vision for the future. These sessions will be a mixture of interviews and presentation for 20 minutes and then there will be an opportunity for questions.

2.10pm Tuesday

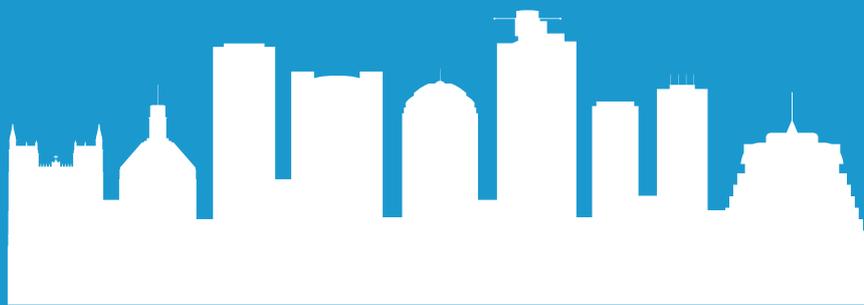
Ben Teusse, CEO Habit Group

Sam Johnson, Student Army - Building movements that matter

3.25pm Tuesday

Sonya Williams, Co-Founder, Director and Co-CEO at Sharesies

Steven Korner, Co-Founder & CEO at Method Recycling





Ben Teusse

Habit Group, CEO
2.10pm Tuesday

Ben co-founded Habit with Steve Pugh in 2003 and now has the role of Group Chief Executive of Habit Group. As a Physiotherapist and with a Masters in Health Practice, he's seen first-hand how evidence-based rehabilitation and health services can improve a person's quality of life. Ben's passion is to deliver best practice healthcare across multiple disciplines, bringing the best service and customer experience to all Habit Group clients.



Sam Johnson

Student Army
2.10pm Tuesday

Sam Johnson is one of New Zealand's most inspiring young citizens. His relentless energy to mobilise people around ideas has a magic ability in building movements that matter! Farm boy turned social entrepreneur, his work is on the leading edge of using the collective to overcome the bureaucratic – shifting our belief system about what is possible when teams, organisations and communities authentically connect and build empathy.

Sam is founder and chief executive of the Student Volunteer Army and is well-known for his entrepreneurial ideas that continue to make significant differences to the lives of others. He leads the team to design and operate projects that impact over 65,000 volunteers each year in New Zealand. The Student Army partnered with New World supermarkets during COVID to design, develop and deploy an end-to-end shopping service for people most at-risk from the virus within a week. Sam oversaw his team scaling from a team of seven to 98 and building capacity to deliver contactless groceries for up to 10,000 households a week. Sam and the team are continuing to make the most of the crisis, as every organisation must do, by rapidly testing new initiatives, and evolving their business model to fit the challenging times we are in.



Sonya Williams

Co-founder, Director & Co-CEO of Sharesies
3.25pm Tuesday

Sonya has built a career in technology and global marketing and product management, in some of NZ's most loved companies Xero and Kiwibank. She is passionate about using technology to solve big problems, and create a more equitable society. This led her to seeing the opportunity to make investing more accessible, providing everyone with an equal chance to grow their wealth. Sonya was the co-winner of the 2020 Women of Influence- Business award, alongside co-founder, Brooke Roberts.



Steven Korner

Co-Founder & CEO at Method Recycling
3.25pm Tuesday

From the kitchen table to international success. Steven and his wife India founded Method from their kitchen table, after continuing to see organisations that wanted to recycle without the tools to be successful. In 2019 Method was recognised as the 15th fastest growing company in New Zealand along with international design, sustainability and marketing awards.

Steven graduated from Canterbury University with First Class Honours in Mechanical Engineering, having initially qualified as a physiotherapist at Otago University. He worked at Fisher and Paykel Healthcare for five years where he led the team designing the award-winning products for neonatal care. He gained a real insight into the design of plastics and product development – skills he's now harnessing as the owner of Method.



OUR COMMITMENT TO YOU

We will work tirelessly to help build a thriving future for financial advice.

A future where New Zealanders obtaining financial advice is a given - a tool for life that they naturally look to.

As a member of Financial Advice New Zealand, you're part of an association that's constantly out in the public informing New Zealanders about quality advice. **As a member you stand out from the crowd as an adviser, who is committed to making a real difference to people's lives.**

As a member, you're supported by a decisive and active voice that advocates for your needs and seeks opportunities to make a positive difference.

As a member, you will be known as a trusted adviser, committed to quality standards and advice.



MEMBER BENEFITS



Weekly newsletters to ensure you are up-to-date with current issues and events



Licensing resources to help you meet your obligations in the new regime



Professional Liability Insurance - comprehensive and modern



Social Media promotions and collateral you can use on your website and in social media



Webcasts to keep you up to date with industry changes



Access to templates and documents for client use



Discounted Group Life & TPD Insurance Scheme



Networking and regular regional meetings with CPD opportunities



An online professional profile where the public can find quality financial advisers



Access to an online portal with your CPD log and Professional Development Plan

06

CONCURRENT BUSINESS SESSIONS

Wednesday 10.55am - 1.10pm

Delivering Consistently Superior Customer Service

John Spence

Time: 10.55am

Applying Behavioural Finance in Principle

Michael Kitces

Time: 10.55am

Ferociously Creating a High-Performance Company Culture

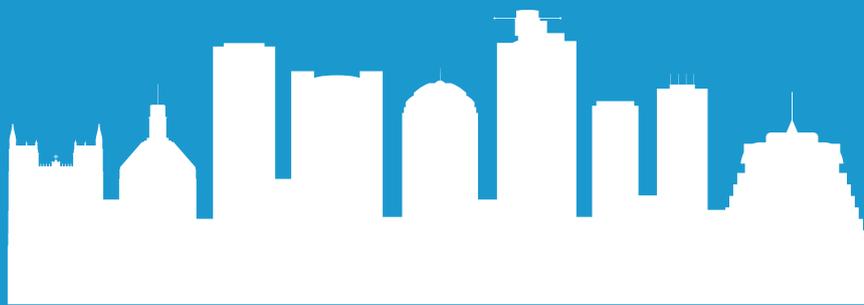
Michael Henderson

Time: 12.05pm

Demographic Change and the Impact on the Future Face of New Zealand

Prof Paul Spoonley

Time: 12.05pm





Delivering Consistently Superior Customer Service

John Spence

Global Business Expert and Executive Coach, USA

Time: 10.55am Wednesday

In a world where consumers can buy basically the same product, at the same or lower price, from dozens of different businesses, ensuring they have a wonderful customer experience is critical to the success of every organisation. John Spence will cover specific ideas and tools you can use to dramatically increase customer satisfaction and loyalty. Customer service isn't just about being courteous to your customers – it's a vital element of business operations that can impact your bottom line and affect how your company is viewed in the public eye. Topics include:

- owning the voice of the customer
- understanding the concept of “Moments Of Truth”
- the five levels of customer satisfaction
- approaching customer service as a craft
- how to turn customers into customer evangelists that become a referral engine driving business to your company
- the importance of providing excellent service for your internal customers

John Spence is recognised as one of the top business thought leaders and leadership development experts in the world and was named by the American Management Association as one of America's Top 50 Leaders to Watch along with Sergey Brin and Larry Page of Google and Jeff Bezos of Amazon.

John was the owner or CEO of six companies and currently serves as a board member or adviser to several organisations and executives. He is a guest lecturer at more than 90 colleges and universities including MIT, Stanford, Cornell, Wharton School of Business, University of Auckland, Canterbury University, University of Krakow, and Kozminski University.



Applying Behavioural Finance in Principle

Michael Kitces

Financial Planning Educator, USA

Time: 10.55am Wednesday

The standard economics assumption is human beings make rational decisions who have utilised their resources to obtain their goals. However, when it comes to investing, behavioural finance research finds human beings engage in shortcuts that can lead to a series of persistent, systematic biases when making decisions. Once you understand behavioural finance you will be able to understand the drivers of your clients' decisions and be able to address them to obtain increased financial health, wealth and wellbeing for them.

Michael Kitces is the Chief Financial Planning Nerd at Kitces.com, dedicated to advancing knowledge in financial planning and helping to make financial advisers better and more successful.

In addition, he is the Head of Planning Strategy at Buckingham Wealth Partners, the co-founder of the XY Planning Network, AdvicePay, New Planner Recruiting, fpPathfinder, and FA BeanCounters, the former Practitioner Editor of the Journal of Financial Planning, the host of the Financial Advisor Success podcast, and the publisher of the popular financial planning industry blog Nerd's Eye View.

In 2010, Michael was recognised with one of the FPA's "Heart of Financial Planning" awards for his dedication and work in advancing the profession.

Sponsored by Consilium





Ferociously Creating a High-Performance Team Culture

Michael Henderson

Business Culture Subject Matter Expert, New Zealand

Time: 12.05pm Wednesday

Make no mistake about cultures at work in your business. The question is, does your culture work for or against your business objectives?

To answer this question you first have to understand what culture is and what it does. Business culture expert Michael Henderson has supervised over 300 company culture transformations around the world and will show you how to;

1. Understand what culture actually is and what it delivers to your business.
2. Determine if your current culture is eating your business strategy for breakfast.
3. Learn how to align your company/team culture to succeed.
4. Avoid the biggest mistake hundreds of organisations make with their culture.

Michael is a Corporate Anthropologist, which means his job is to help organisations enhance their workplace culture to improve business results, customer experience and employee satisfaction.

As an anthropologist, Michael delivers deep insights into culture that go far beyond most organisations current levels of know-how and understanding. He is vastly experienced having worked with and studied both traditional and organisational cultures all around the world.

He has supported over three hundred company culture transformations across a wide variety of sectors. His clients include The Australian Navy, The New Zealand Rugby Union, Canon, NZ Olympic High Performance Sports, Westpac Bank, Coca-Cola, Z Energy, McDonalds, The Silver Ferns Netball team, Outward Bound, Sanitarium, Fidelity Life, Refining NZ.

Michael is an award-winning author of eight books on organisational culture, leading culture, culture and values, and is a co-author of a book on Thought Leadership.



Demographic Change and the Impact on the Future Face of New Zealand

Prof Paul Spoonley

Demographer, former Pro Vice-Chancellor of the College of Humanities and Social Sciences at Massey University

Time: 12.05pm Wednesday

Our five million-strong population is riding a wave of unprecedented social change and population change – from plummeting birth rates and a burgeoning number of older people to Auckland’s surge as an ethnically diverse supercity. This will impact on the goods and services that will be required in the future due to the changing cultural needs and the impacts of an aged population.

This session will provide you with a look at your future customer base and give you up-to-date information to allow you to assess what your business will need to look like in the future in order to be relevant in this changing world.

Distinguished Professor Paul Spoonley was, until 2019, the Pro Vice-Chancellor of the College of Humanities and Social Sciences, at Massey University. He retired from that post in April this year. He is the author or editor of 28 books, the most recent being Rebooting the Regions (2016), while his book, The “New” New Zealand – Facing Demographic Disruption, was published last August. He is also writing a book on the extreme right in this country. He was a Programme Leader of a research programme on the impacts of immigration and diversity on Aotearoa.

He was made a Fellow of the Royal Society of New Zealand in 2011 and was granted the title of Distinguished Professor by Massey University in 2013. He was awarded the Science and Technology Medal by the Royal Society in 2009, he was a Fulbright Senior Scholar at the University of California Berkeley in 2010, and since 2013 he has been a Visiting Researcher at the Max Planck Institute for the Study of Religious and Ethnic Diversity in Göttingen, Germany, most recently in 2019. The Auckland War Memorial Museum made him a Fellow in 2015. He is currently a member of the Marsden Fund Council, and a Senior Affiliate of Koi Tū : The Centre for Informed Futures. He has been a long time participant in the Metropolis network and recently became the Co-Director of this international network of those interested in migration.

Sponsored by Marsh



07

CONCURRENT TOOLS FOR YOU SESSIONS

Wednesday 1.40pm - 3.55pm

Topic: The Secrets of High-Performers

Speaker Chelsea Lane

Time - 1.40pm

Topic : Bounce Forward Fast: practical session on how resilience fails and how to bounce forward fast - specific practices

Sven Hansen

Time - 1.40pm

Topic : Goals that you Actually Want (clarity on what really matters, eliminating what doesn't)

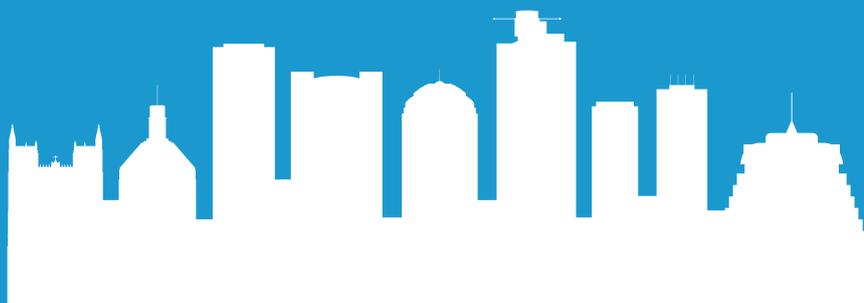
Dr. Sarah Ferguson

Time - 2.50pm

Topic : Check Body, Check Emotion, Check Mind: how to be fully present and engaged when it matters.

Sven Hansen

Time - 2.50pm





Topic: Bounce Forward Fast – How resilience fails and how to bounce forward fast

Dr Sven Hansen, MBChB, MBA

The Resilience Institute

Time 1.40pm Wednesday

Inspire, educate and entertain. Sven will deliver real skills to help people transform their lives and their work. Life and work are better when we can bounce, grow, connect and find flow. He explains both the theory and practices to build physical, emotional and mental wellbeing. You will learn practical tips to make a meaningful difference to your life and your work.

1. Resilience in adversity – bounce, grow, connect, and flow
2. Recognise how resilience fails and the associated mental health risk
3. How to bounce fast and with skill and confidence – and repeat
4. Using adversity to stimulate growth and connection

Dr Sven Hansen, (MBChB, MBA) has been working to help business master mental health, wellbeing and resilience for the past 25 years. He has worked with multinationals, professionals, education, entrepreneurship and sports.

With a background in Special Forces and Sports Medicine, Sven is the founder of the Resilience Institute with teams in New Zealand, UK, Australia, Asia, Europe and the US. Based on their own research, they created a Resilience App to measure, learn achieve growth. Sven lives in Auckland and is a keen outdoor sports enthusiast.

Sponsored by AIA



**HEALTHIER, LONGER,
BETTER LIVES**





Topic: Check Body, Check Emotion, Check Mind – How to be fully present and engaged when it matters.

Dr Sven Hansen, MBChB, MBA

The Resilience Institute

Time 2.50pm Wednesday

Inspire, educate and entertain. Sven will deliver real skills to help people transform their lives and their work. Life and work are better when we can bounce, grow, connect and find flow. He explains both the theory and practices to build physical, emotional and mental wellbeing. You will learn practical tips to make a meaningful difference to your life and your work.

1. Situational awareness in body, emotion and mind
2. Mastering tactical calm and focus under pressure
3. Situational agility: name, tame and reframe thoughts and feelings
4. Stepping into the flow the state and optimal performance

Dr Sven Hansen, (MBChB, MBA) has been working to help business master mental health, wellbeing and resilience for the past 25 years. He has worked with multinationals, professionals, education, entrepreneurship and sports.

With a background in Special Forces and Sports Medicine, Sven is the founder of the Resilience Institute with teams in New Zealand, UK, Australia, Asia, Europe and the US. Based on their own research, they created a Resilience App to measure, learn achieve growth. Sven lives in Auckland and is a keen outdoor sports enthusiast.

Sponsored by AIA



**HEALTHIER, LONGER,
BETTER LIVES**



08

FIRESIDE CHAT

Lunchtime chat rooms with Q&A

Tuesday 12.40pm

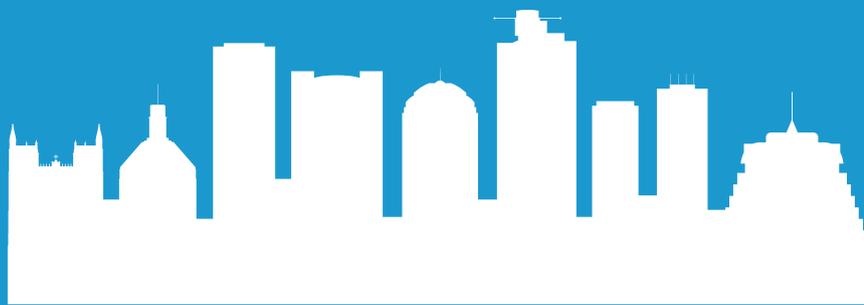
Room 1 - How to navigate the online process to obtain a full licence with the FMA
Anita Frazer, Head of Compliance Services & Chris Revell, Senior Adviser - Licensing

Room 2 - Financial Planning Standards Board (FPSB)
Noel Maye, CEO FPSB

Wednesday 1.10pm

Room 1 - How to navigate the online process to obtain a full licence with the FMA
Anita Frazer, Head of Compliance Services & Chris Revell, Senior Adviser - Licensing

Room 2 - Discussion on the new research project release with the Financial Advice NZ Board





Noel Maye, MBA, CAE
FBSP Chief Executive Officer
Time 12.40pm (Tues)

Attend this Fireside Chat with Noel Maye, CEO of FPSB, to hear what initiatives they have been implementing and where the organisation and financial planning is heading in the future.

Noel Maye is Chief Executive Officer of the Financial Planning Standards Board (FPSB). Before joining the organisation, Maye was Senior Vice President of Certified Financial Planner Board of Standards, Inc. (CFP Board) in the United States, where he oversaw the international, legal, consumer and public affairs, and communications departments, and served as corporate spokesperson. Prior to CFP Board, he was an associate with Ogilvy, Adams & Rinehart, a New York-based public relations firm, where he specialised in working with financial services clients.

Maye holds the Certified Association Executive (CAE) credential, completed the National Association of Corporate Directors' director training program, and qualified as a lead auditor for certification bodies through the American National Standards Institute. Born and raised in Ireland, he holds an undergraduate degree in electronic engineering from Trinity College Dublin, an MBA in business administration from the University of Colorado and INSEAD's Executive Certificate in Global Management.

Anita Frazer, Head of Compliance Services, FMA

Chris Revell, Senior Adviser - Licensing, FMA

Time 12.40pm (Tues)

1.10pm (Wed)

The Financial Markets Authority presents navigating the online process to obtain a Financial Advice Provider full licence. The presentation will include the information you will need at the time you apply for your full license. There will be an opportunity to ask questions of the presenters.

Financial Advice

NEW ZEALAND

info@financialadvice.nz

Level 8, 342 Lambton Quay, Wellington
New Zealand

PO Box 5513, Wellington 6140
New Zealand

0800 432 101

www.financialadvice.nz

