



IGNITE

NEW IDEAS NEW POSSIBILITIES NEW CONVERSATIONS

FINANCIAL ADVICE NEW ZEALAND
CONFERENCE 2022

Te Pae, Christchurch
6 - 7 September



PROGRAMME
PREVIEW



GET READY TO IGNITE...

The Financial Advice New Zealand 2022 Conference will ignite what drives you and challenge you to take risks, explore new opportunities, step outside the box and do things differently.

We are excited to invite you to join us at the Financial Advice New Zealand Conference 2022. We believe this will be our most engaging and memorable conference yet. One that will ignite new ideas, new possibilities, new conversations - and set sparks flying in the sector.

This booklet provides an overview of our conference programme, our speakers and what you can expect from attending this fantastic event.

We look forward to seeing you in Christchurch this September.



This conference programme is subject to change. Any changes to the programme will be updated on the website and a full detailed programme will be provided to attendees prior to the conference.



VENUE AND ACCOMMODATION

The modern and vibrant Te Pae Christchurch is the city's gathering place — an architectural and social landmark designed as a welcoming heart in the centre of the city. It is the perfect venue for us to connect, ignite new ways of thinking about how we do business and have fun.

There is a wide range of accommodation options in and around the city centre. Take advantage of discounted hotels by booking via our website:

<https://financialadvice.nz/conference-2022-accommodation/>

-  2 ACTION PACKED DAYS
-  20 HIGH-PROFILE SPEAKERS
-  YOUR CHOICE OF 12 WORKSHOPS TAILORED FOR YOU AND YOUR BUSINESS
-  PLENTY OF NETWORKING OPPORTUNITIES FOR ATTENDEES AND SPONSORS

DAY ONE HIGHLIGHTS

9.00AM Conference opens: MC, Rawdon Christie
Opening Address: Christopher Luxon

9.30AM **Keynote: Chris Riddell, Futurist. Optimist**
Topic: Reinvented Business

11.10AM **Keynote: Jonathan Pain, Global Economics Expert**
Topic: The Geopolitical Landscape

11.45AM Financial Advice NZ Board update
Launch of the 2022 Retirement Expenditure Research

12.15AM Lunch & Fireside Chats

1.50PM **Keynote: Craig Hudson, Managing Director at Xero Aotearoa**
Topic: Leadership in the New World

2.55PM **LIGHTNING SESSION**
In this fast-paced session we will have four dynamic business leaders provide a snapshot of their leadership, business success and challenges, and their vision for the future.

1. Samantha Barrass, Chief Executive FMA
2. Vic Crone, previous CEO Callaghan Innovation
3. Victoria Devine, Multi award-winning financial adviser and founder and host of 'She's on the Money' podcast
4. Sir Ian Taylor, One of New Zealand's foremost technology innovators

5.40PM Day one close

7.00PM **AWARDS AND GALA DINNER**
(Pre-dinner drinks @6.40pm)



DAY TWO HIGHLIGHTS

9.00AM Day two welcome: MC, Rawdon Christie

9.10AM **Keynote: Kamal Sarma, Expert on Human Connection**
Topic: Reinvented Business



TOOLS FOR YOUR BUSINESS CONCURRENT SESSIONS

10.50AM **STREAM ONE**
Matt Church, Founder of Thought Leaders and The Leadership Landscape
Topic: Powerful positioning

STREAM TWO
Ekant Veer, Professor of Marketing, Canterbury University
Topic: Maximising your brand

STREAM THREE
Adrian Pickstock, Director Quad Coaching
Topic: Meshing Strategy with Reality - Execute your way to success

11.50AM Matt Church, Founder of Thought Leaders and The Leadership Landscape
Topic: How to be more than a trusted adviser

Shefali Pawar, Senior Research Officer, Te Ngira: Institute for Population Research
Topic: The changing demographic of Aotearoa

Adrian Pickstock, Director of Quad Coaching
Topic: Who is your who?

12.35PM Lunch and Fireside Chats

TOOLS FOR YOU CONCURRENT SESSIONS

1.35PM **STREAM ONE**
Kayleigh Woodings, Leadership, Emotional Culture and Strengths Facilitator
Topic: Diving deep into your strengths

STREAM TWO
Laura Holyoake, AIA Vitality Coach
Topic: Adviser wellbeing

STREAM THREE
Kevin Biggar, Motivational Speaker
Topic: Achieving ignition

2.30PM Daniel Batten, Serial Entrepreneur and CEO Coach "From Ingenuity to Invincibility"
Topic: Cultivating winning habits

Gilbert Enoka, All Blacks Manager and Mental Skills Coach
Topic: Performing under pressure

Amy Scott, People Expert and Mentor
Topic: Your best self - Bring it!

3.25PM **Keynote: Sir Michael Jones, KNZM and All Black Legend**
Topic: Leading change



4.15PM Conference close

MEET OUR SPEAKERS

KEYNOTE SPEAKERS



CHRIS RIDDELL
FUTURIST. OPTIMIST
KEYNOTE: REINVENTED
BUSINESS
DAY 1, 9.30AM

Human futurist, forensic optimist and energising catalyst; Chris makes sense of the rapidly changing and increasingly disrupted digital world we live in... and makes a case for a future that will be undoubtedly better—and more awesome—than it is today.

Chris's keynote is all about Reinvented Business – How can we continue to grow thrive and innovate? What could incredible business look like amidst the incredibly unusual? Let's discover and uncover the diversifications, innovations and strategies that some of the world's most exciting businesses have employed to ensure that they're riding the wave of reinvention-while not being drowned in the process.

As a renowned strategist and senior business advisor, Chris has worked globally with some of the biggest and most influential brands and businesses on the planet, his intuitive and instinctive approach to tracking global patterns and unlocking opportunities has had significant impact on how businesses—and humans— can take purposeful steps towards creating real and lasting positive impact on our shared future.



JONATHAN PAIN
GLOBAL ECONOMICS EXPERT
KEYNOTE: THE GEOPOLITICAL
LANDSCAPE
DAY 1, 11.10AM

Every day Jonathan wakes up and is fascinated by all the flashing numbers on his screens. He then endeavours to try and understand what it all means. In his keynote, Jonathan will explain why he is more captivated and curious than he has been in 38 years and he will open your eyes to the changes that are taking place in the global economy.

We face the geopolitical reality of a new Axis of Autocracy, with Russia and China at its core. This will shape and define the contours of the global geopolitical landscape for many years to come. Furthermore, we have a stagflationary reality which will shape and define your portfolios and your business in the year ahead.

Jonathan Pain has been in the investment industry for 38 years and has led investment teams in London, Bahrain and Sydney. He is the author of The Weekly Pain Report which is written without fear and without favour. Jonathan has lived in six countries and travelled to sixty.



CRAIG HUDSON
MANAGING DIRECTOR XERO
AOTEAROA & PACIFIC ISLANDS
KEYNOTE: LEADERSHIP IN THE
NEW WORLD
DAY 1, 1.50PM

Craig Hudson is a champion for wellbeing in business. His keynote will cover Leadership in the New World – what business looks like at Xero and how to apply these principles for small business. Craig will tackle the key stressors advisers businesses are facing and how to work through them.

As a key member of the senior executive team at Xero, Craig is responsible for driving relationships with government, financial institutions, enterprise and promoting the small business economy. His work, which has emphasised the importance of looking after employees' mental health, includes championing the introduction of wellbeing leave, flexible working practices, and the development of an inclusive and diverse workplace.

Craig has been hugely influential in putting the spotlight on the stresses small businesses face, including setting up a programme offering mental health support to 5000 small business owners, their employees and families via access to anonymous counselling through its Employment Assistant Programme.



KAMAL SARMA
EXPERT ON HUMAN
CONNECTION
KEYNOTE: THE CONNECTION
ADVANTAGE
DAY 2, 9.10AM

How do you go from being a monk, to working for one of the most prestigious consulting companies, McKinsey and Company and then become a venture capitalist? Well that's the journey our keynote speaker Kamal Sarma has taken.

Kamal is one of the world's leading experts in Leadership and Connection. His keynote will explore The Connection Advantage – How to create deep connections at personal level, team level and at a purpose level and how to use the connection advantage to create a shortcut to change and build a sustainable competitive advantage.

Kamal is the CEO of Rezilium which consults to companies such as Google, Facebook, PWC, Deloitte, Bank of New York, Commonwealth Bank just to name a few.

In his spare time he has written 3 books, Mental Resilience: The Power of Clarity – How to develop the focus of a warrior and the peace of a monk which is a best seller The Leadership Leap and the Art of Win-Win Conversations- The art science of human connection which is a culmination of 11 years of research on what does it mean to truly connect to another human being.



SIR MICHAEL JONES
KNZM & ALL BLACK LEGEND
KEYNOTE: LEADING CHANGE
DAY 2, 3.25PM

All Black legend and World Rugby Hall of Famer Sir Michael Jones is also well known for achieving many great things off the field. In his keynote, Sir Michael will share his incredible story, unpack what motivates him and how he leads and inspires others to create change.

Sir Michael Jones received a New Zealand Medal for service to the Pacific Island community in 1997 and was knighted in 2017 for his work in driving economic and social development for Pasifika people in New Zealand, and in the work with youth in NZ. He is Chair of the Village Community and Youth Trust, which provides mentoring, leadership and education support for Pasifika youth in Auckland, and the Pacific Advancement Trust, which has recently established the first Pacific Island Secondary School in New Zealand.

Michael has extensive experience in commercial and business sectors and serves on a number of Boards both private sector and at the community level and is Patron for various organisations such as YMCA Auckland.

LIGHTNING SPEAKERS



SAMANTHA BARRASS
CHIEF EXECUTIVE FMA
LIGHTNING SPEAKER
DAY 1, 2.55PM

Samantha has extensive international regulatory experience, most recently as Chief Executive of UK's Business Banking Resolution Service, a dispute resolution scheme for banks and business customers. Prior to that she was Chief Executive of the Gibraltar Financial Services Commission, which oversees the prudential and conduct regulation of Gibraltar's financial services sector.

She has held a number of other senior roles at finance regulators and industry associations, including the UK's Financial Conduct Authority and the London Investment Banking Association.

Samantha grew up in Christchurch, and studied Economics at the University of Canterbury and Victoria University of Wellington, before beginning her career as an economist at the Reserve Bank of New Zealand.



VIC CRONE
PREVIOUS CEO CALLGHAN
INNOVATION
LIGHTNING SPEAKER
DAY 1, 3.20PM

Vic has significant executive and governance experience in technology and innovation. She brings a strong customer focus, and a track record of leading and implementing strategy, and building organisational culture. Vic was previously the CEO of Callaghan Innovation, Managing Director of Xero NZ and New Markets, following executive roles at Chorus and Telecom New Zealand.

Vic is Chair of the Stats NZ Advisory Board and Figure NZ Board. She has also been an Independent Director on the Boards of a number of companies and organisations in the technology sector, including RedShield, Creative HQ and the Hi-Tech Trust.



VICTORIA DEVINE
MULTI AWARD-WINNING
FINANCIAL ADVISER
LIGHTNING SPEAKER
DAY 1, 4.35PM

Victoria Devine is a multi-award-winning financial adviser and best-selling author, helping thousands of people change their relationship with money. She is a young, influential, and driven entrepreneur who pushes the boundaries in not just the finance industry but in a number of charities and non-profit organisations.

Honest, relatable, non-judgemental, and motivating, Victoria is a financial adviser who knows what millennial life is really like and where we can get stuck with money stuff.

Founder and host of She's on the Money, a chart-topping personal finance podcast for millennial women, Victoria is passionate about empowering women to make smart money decisions. After one season in production, She's on the Money has quickly become a progressive online community of more than 200,000 women, a podcast with more than 5 million downloads and a financial education platform empowering women with the tools and confidence they need to change their financial situations.



SIR IAN TAYLOR
ONE OF NEW ZEALAND'S
FOREMOST TECHNOLOGY
INNOVATORS
LIGHTNING SPEAKER
DAY 1, 5.00PM

From growing up in a house without electricity in the 1950s, to leading an award-winning, globally recognised company at the cutting edge of technology and innovation, Sir Ian Taylor has not lived an ordinary life. Ian founded Animation Research Ltd (ARL) in 1990 on nothing more than a handshake with the Vice Chancellor of the University of Otago. Today, working from their base in Dunedin, ARL covers sports events all over the world. This is just one of many of Ian's successful ventures.

An inspirational innovator who has put Dunedin on the map – Ian has never stopped believing that Kiwis can take on the world. Taylor was inducted into the New Zealand Technology Hall of Fame in 2009. In the 2012, Sir Ian Taylor was appointed a Companion of the New Zealand Order of Merit for services to television and business. In 2019, Taylor was named Innovator of the Year at the annual New Zealander of the Year Awards.

TOOLS FOR YOUR BUSINESS



MATT CHURCH
FOUNDER OF THOUGHT
LEADERS AND THE LEADERSHIP
LANDSCAPE
TOOLS FOR YOUR BUSINESS
DAY 2, 10.50AM & 11.50AM

WORKSHOP 1: POWERFUL POSITIONING

How to stand out in a competitive landscape. It's crowded out there and your ability to be remarkable and memorable is a key competitive advantage. Learn how to position yourself and what you do to get the results you want.

WORKSHOP 2: HOW TO BE MORE THAN A TRUSTED ADVISER

Giving advice is easy, building a business around that relationship is an art. Learn how to generate greater commercial success by developing expertise.

We welcome back for a third time the very popular Matt Church. Matt is committed to helping people prepare for tomorrow by taking action today. His philosophy can be summed up in one word: NEXT! What is the best next thing you can do to future proof your business or career?

A strategic thinker, Matt is obsessed with the idea of leverage. While many are painting a scary view of the future he sees one full of potential. Whether it's what he writes, his direct advice to thought leaders, or his conference presentations delivered to audiences around the world, he communicates with deep focus, commercial clarity and a razor sharp wit on three things: removing fear and replacing it with confidence, removing confusion and replacing with certainty and mobilising people in pursuit of a better future.



ADRIAN PICKSTOCK
DIRECTOR QUAD COACHING
TOOLS FOR YOUR BUSINESS
DAY 2, 10.50AM & 11.50AM

WORKSHOP 1: MESHING STRATEGY WITH REALITY - EXECUTE YOUR WAY TO SUCCESS

How many strategy sessions have you sat through only to rediscover 'the plan' a year later at the next strategy workshop? In this presentation, Adrian will discuss the importance of Execution Planning and how to mesh your strategy with reality - implementing a system and rhythm that drives performance and brings your vision to life. Topics covered will include:

- The Disciplines of Execution
- Habits critical for successful Execution

WORKSHOP 2: WHO IS YOUR WHO?

You can't grow your business if you don't recognise that your customers are of paramount importance and that there is far more to them than a statistic can convey. In this workshop, Adrian will share tips on how to get real clarity on who your core customer is - your target for all future growth. Topics covered will include:

- Find your CORE customers
- Discover and deliver your uncommon offering

Adrian is a strategy and planning adviser and coach to entrepreneurs, CEOs and senior management teams in New Zealand.

An internationally Certified Gazelles coach and Outthinkers strategist he helps companies establish and implement strategies and execution plans to achieve their growth objectives. He has access to best-in-class resources including Mastering the Rockefeller Habits, Scaling Up, Outthink the Competition and Pat Lencioni's Table Group amongst others.

Adrian will get you thinking beyond your comfort zone, and to do this in a manner that results in you embracing, celebrating and being motivated to achieve your objectives and goals.



EKANT VEER
PROFESSOR OF MARKETING,
UNIVERSITY OF CANTERBURY
TOOLS FOR YOUR BUSINESS
DAY 2, 10.50AM

WORKSHOP: MAXIMISING YOUR BRAND

Having a strong brand can often be the key difference clients look for when choosing a provider. But what do we mean by 'strong' and how can you achieve this? This workshop explores how to build brand value and, more so, how this value can be communicated to your current and prospective clients. Prof. Veer draws on the psychology of choice and how alignment of values between your firm and your clients enables a stronger and longer-lasting relationship. You will explore the techniques marketers use to communicate value effectively, especially when using digital tools.

Ekant Veer is a Professor of Marketing and the Director of the Christchurch Knowledge Commons at the University of Canterbury. He is a multi-award winning teacher and researcher having been named in the Top 40 under 40 Business School Professors worldwide; an Ako Aotearoa Tertiary Teaching Excellence Award winner; UC's Teaching Medal awardee in 2017 and five times winner of the UCSA's lecturer of the year award.

His work looks at the role that marketing can play in both driving social change and community wellbeing as well as what impact digital technology plays in consumer interactions and their sense of identity.



SHEFALI PAWAR
RESEARCH OFFICER, TE NGIRA:
INSTITUTE FOR POPULATION
RESEARCH
TOOLS FOR YOUR BUSINESS
DAY 2, 11.50AM

WORKSHOP: THE CHANGING DEMOGRAPHIC OF AOTEAROA

Like many parts of the world, the demographic landscape of New Zealand continues to change with many structural and compositional shifts projected for the population over the coming years. This workshop takes a close-up look at the embedded inter-generational and ethnic inequities that exist and the challenges they create for planners, policy makers, business owners and service providers. From there, Shefali will discuss the key considerations for our ageing and increasingly diverse population.

Shefali's area of interest and expertise is around working with large and complex datasets where she can use her skills to convert data and information into knowledge which can be utilised in informed decision making. An ongoing part of her work involves providing detailed demographic population profiles to iwi, councils and other organisations. She is particularly interested in the area of population health and has more than ten years' experience in analysing and researching primary and secondary sector health data.

TOOLS FOR YOU



KAYLEIGH WOODINGS
LEADERSHIP, EMOTIONAL
CULTURE AND STRENGTHS
FACILITATOR
TOOLS FOR YOU
DAY 2, 1.30PM

WORKSHOP: DIVING DEEP INTO YOUR STRENGTHS

This interactive workshop will get you thinking about and discussing what you are really good at and how you can leverage those skills.

Too often we focus on:

- our weaknesses,
- what's wrong, and
- fixing the problem.

BUT... focusing on strengths is much more likely to create lasting change and deliver benefits, both in work and in your personal life. An accredited CliftonStrengths Coach, Kayleigh will help you understand your strengths and enable you to focus on and celebrate what's right, rather than what's wrong.

Kayleigh has a diverse background, with almost 20 years of combined experience in Sales, Tourism, Operations, Military, Project Management, Recruitment, Youth Work, and a range of other corporate roles in New Zealand, the UK, Canada, France, and Bulgaria. She has extensive knowledge of complex and high-pressure environments and thrives in building successful objective-driven teams and individuals.

Kayleigh is the Director of Blue Mercury Leadership, an Aotearoa-focused company dedicated to growing strong, empathetic workplaces through listening, learning and action.



DANIEL BATTEN
SERIAL ENTREPRENEUR AND
CEO COACH "FROM INGENUITY
TO INVINCIBILITY"
TOOLS FOR YOU
DAY 2, 2.35PM

WORKSHOP: CULTIVATING WINNING HABITS

In his workshop, Daniel will give you practical tools you can take back to your business and use straight away to become more effective:

- 1. Overcoming procrastination and taking action** - Procrastination is not a problem of skillset, it's a problem of mindset. Daniel will introduce a self-influencing strategy that allows people to enter the mindset of immediate action-taking. This is based on research on what characterises the most highly effective professionals, and the mindsets they have, and how they cultivated this mindset.
- 2. Time management** - A simple evidence-based method that Daniel has used with clients to raise productivity by 20%. It's based on how you batch, prioritise actions and schedule routine tasks such as administration.
- 3. Managing energy levels through the day** - Have you found yourself saying "I've got so many meetings and I have to be effective all day. How do I do this?" Daniel will cover practical strategies that anyone can pick up to have more effective meetings, get to the end of the day still feeling energised, and be more present with each person you deal with."

Daniel Batten is an entrepreneur, coach, ClimateTech VC, Bitcoin ESG analyst, author and former TV actor. He has been recognised as "raising the NZ technology ecosystem at all levels" and is the author of "How to Change the World with One Pitch" (Amazon 5-star rating), founder of geneious.com and a tech investor with 22 years experience.

He spends his days trying to be a good dad to his three daughters, Bitcoin analysis, teaching breathing techniques, helping to start new schools based on new education models, and coaching a select group of founders and global influencers.



LAURA HOLYOAKE
AIA VITALITY COACH
TOOLS FOR YOU
DAY 2, 1.30PM

WORKSHOP: ADVISER WELLBEING

Recent research from AIA explored how financial advisers in New Zealand are doing in terms of their mental health, wellbeing, stress levels, work-life balance, quality of life, and engagement in their work.

This interactive workshop discusses the key findings and the relationship between client engagement and adviser wellbeing. Laura will also provide practical steps and tools you can use to build resilience, overcome anxiety and improve overall wellbeing.

Laura is passionate about health, wellness, and proactive financial planning to ensure a future that is 'Plan A' – and not 'Plan B'. In her role as AIA Vitality coach for New Zealand she is committed to empowering Kiwis to make small, healthy changes to live life to the fullest, with a focus on the four core AIA Vitality pillars: Eat Well, Move Well, Think Well and Plan Well.

Laura offers a holistic approach to health and wellbeing, with a strong background in insurance from previous roles, together with a lifetime of involvement in NZ health and sport. From running, cycling, competing in Ironman, and exploring beautiful New Zealand trails and beaches, Laura is heavily invested in living her 'healthy' each and every day.



GILBERT ENOKA
ALL BLACKS MANAGER AND
MENTAL SKILLS COACH
TOOLS FOR YOU
DAY 2, 2.35PM

WORKSHOP: PERFORMING UNDER PRESSURE

Gilbert encourages individuals to take ownership of their own direction and to improve their ability to control the many variables that inhibit optimal performance.

His workshop will help you understand the skills required to perform under pressure and how to best deliver these tools when in the face of competition. He will give insight into the psychology behind individual and team success in world-level sport and how this can be applied to any walk of life.

Gilbert Enoka has a long history of success as a mental skills coach with New Zealand's corporate and sporting elite. He is internationally renowned for his 20-year history with the All Blacks, first as their mental skills coach and now as manager.

Gilbert has been with the All Blacks for over 200 tests and during that time the team has won back-to-back Rugby World Cups, one Laureus Award (for the best team in the world), 13 Bledisloe Cups, three Grand Slams, seven Tri Nations and four Rugby Championships.

Gilbert's reputation has also seen him work with the Black Caps, Silver Ferns, Crusaders and most recently with WRC Champion Haydon Paddon. However, his expertise is not limited to the sports field but was also integral to his 12 years as general manager for New Zealand's largest real estate firm, Harcourts International.



KEVIN BIGGAR
MOTIVATIONAL SPEAKER
TOOLS FOR YOU
DAY 2, 1.30PM

WORKSHOP: KEVIN BIGGAR

Ever thought that you can't do it? Kevin Biggar will have you thinking again! Trans-Atlantic rowing race winner, Antarctic trekker and TV presenter Kevin Biggar specialises in helping people take on their own big challenges.

Kevin's workshop will give you practical insights and advice to help remove your internal barriers and make a step change in performance. This includes techniques about how to:

- deal with doubts
- be smarter about failure
- lift performance of your team; and
- be more resilient in the face of setbacks

His insights, supported by his story of an absolute underdog taking on two of the world's toughest endurance feats, will have you laughing out loud and leave you more enthusiastic and empowered about your own challenges.





AMY SCOTT
PEOPLE EXPERT
TOOLS FOR YOU
DAY 2, 2.35PM

WORKSHOP: YOUR BEST SELF - BRING IT!

Forget knowing what to do - it's about "doing" what we know! With clarity, communication & commitment - strap yourself in for a fun fast paced practical session from one of Australasia's best speakers. Amy's workshop will give you the framework you need to get motivated and stay motivated to achieve your goals in any area of your life. You'll leave with the ability to initiate new and meaningful conversations and improve your relationships, as well as the inspiration to bring out the best version of yourself.

Inspired by many years of experience as a lawyer, Amy realised how miscommunications affected relationships in families and workplaces and thus the mental health of our people. she set out on a mission to learn how to teach effective communication to ensure our people thrived. Today, Amy has assisted thousands of people to overcome their mental blocks, saved relationships, built better work places and ultimately made people happier and healthier. That's her mission and that is why she continues to teach, support, mentor and inspire.



OTHER CONFERENCE EVENTS



ANNUAL GENERAL MEETING (AGM)

MONDAY 5 SEPTEMBER, 3.00PM
TE PAE CONVENTION CENTRE, CHRISTCHURCH

Find out more and register for the AGM at <https://financialadvice.nz/conference-2022-home/>

MASTERCLASS

ADVANCED LEARNINGS FOR FINANCIAL PLANNING, INVESTMENT AND OTHER CFP AND CLU PROFESSIONALS

MONDAY 5 SEPTEMBER 9.30AM - 12.30PM
TE PAE CONVENTION CENTRE, CHRISTCHURCH

MICHAEL KITCES (VIRTUAL)

Michael E. Kitces is the Chief Financial Planning Nerd for Kitces.com, publisher of the leading financial adviser blog Nerd's Eye View, and enthusiastic host of the Financial Advisor Success podcast, all dedicated to making real financial advisers better and more successful. Michael has 20 years of experience as a financial adviser, having worked across multiple industry channels, and has spoken at over 700 events for financial advisers, from keynoting the largest of national industry conferences to leading workshops at elite events to presenting his research at a wide range of industry association events. Michael will present his research on what makes financial planning more efficient.

DANTE DE GORI

Dante De Gori is a proud CFP professional and is the Head of Stakeholder Engagement at FPSB. Prior to joining FPSB, De Gori was the CEO of the Financial Planning Association of Australia Ltd. and served on several FPSB Committees and Working Groups including former chair of the FPSB Council and of the Chief Executives Committee from 2018 to 2021.

CERTIFIED FINANCIAL PLANNER® is the highest certification in financial planning globally with more than 200,000 CFP® professionals worldwide. This session will explore the role of the Financial Planning Standards Board Ltd (FPSB), the owner of the CFP marks, in setting standards for the financial planning profession and the priorities being delivered in the current environment to help improve the growth, standing and awareness of financial planning both locally and across the globe.

Find out more and register for the Masterclass at <https://financialadvice.nz/conference-2022-masterclass/>



GALA DINNER & AWARDS NIGHT



CELEBRATING EXCELLENCE IN FINANCIAL ADVICE

TUESDAY 6 SEPTEMBER 7.00PM
(PRE-DINNER DRINKS 6.40PM)
TE PAE CONVENTION CENTRE

The Financial Advice New Zealand Awards and Gala Dinner present such an important opportunity for the sector to come together to acknowledge and celebrate the outstanding work of New Zealand's financial advisers and support staff in regard to their commitment to the profession, their clients and the wider community.

There are five awards categories:

- Service to the Profession award
- Outstanding Adviser award
- Rising Star award
- Outstanding Support Person award
- Community Service award

Find out more and register for the Awards and Gala Dinner at <https://financialadvice.nz/conference-2022-registration/>



GET INVOLVED

ICEBATH CHALLENGE

Nominate a fellow attendee to take part in our Ice Bath Challenge. The top three nominees will compete for a prize of \$1,000 for a charity of their choice. Whoever can stick it out the longest wins! Brrrrr...

Did you know? Ice baths have a number of potential health benefits.

Exposing your body to cold conditions on a regular basis can make you more adaptable to stress. As your body adjusts to the cold, the vagus nerve responsible for the regulation of internal organ functions, such as digestion, heart rate, and respiratory rate is stimulated. The resulting increase in nervous system activity has positive effects on all kinds of health conditions including anxiety, depression, and gastrointestinal problems.



Most likes wins!!!

Say "selfie!" Snap pics of yourself and your peers taking part in the many events and activities on offer during the conference and share your pics on Facebook and/or LinkedIn tagging **Financial Advice NZ** and using the **#IGNITE2022NZ**.

Get creative... the post with the most likes wins a prize of \$500!



OUR SPONSORS

Thank you for supporting Financial Advice New Zealand, our members and our collective mission to help more New Zealanders access quality financial advice.





IGNITE

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NEW ZEALAND

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