

FINANCIAL ADVICE NZ

OUT OF THE BOX TOUR

MARCH & AUGUST 2023

2-PART KNOWLEDGE SERIES

SPONSORSHIP BOOKLET



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About Out of the Box.

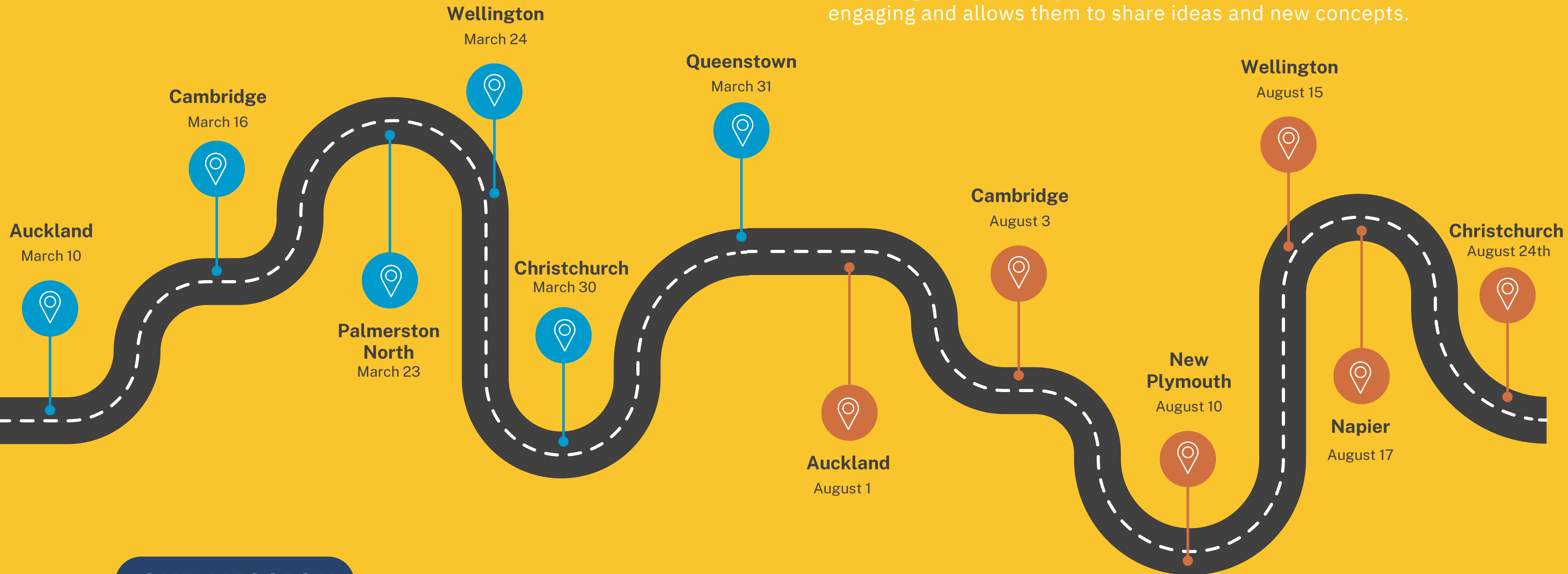
Financial Advice NZ is excited to be touring around the regions in 2023. We will be on the road in both March and August bringing expert knowledge and networking to financial advisers in your region.

Coming along for the ride will be a line-up of speakers who will share their expertise on specialist topics, the markets and economy, and current legislation and regulations. We will also be discussing the Professional Liability Insurance environment, making time for a quick round of speed dating (but not as you know it), and bringing a little bit of motivation to the mix as well.

Join the discussion, keep your finger on the pulse, gain some fresh ideas, and connect with advisers in your region.

OUR VISION

We believe in the value of bringing advisers together to obtain knowledge, competency and skills in an environment that is engaging and allows them to share ideas and new concepts.



OUR MISSION

Together, we will deliver a valuable, entertaining and accessible knowledge series for financial advisers. We invite you to join us as a sponsor so we can continue to offer our members and the wider sector the highest standard of events and networking opportunities.

20 Sponsorship 23 opportunities.

The Out of the Box knowledge series will be touring to a total of 12 locations across two months (March and August). This means we have **12 exclusive gold sponsorship opportunities** for you to take advantage of as well as other options to get involved in your region.

GOLD SPONSOR

As a Gold sponsor, you will have sole naming rights for your chosen region with your brand included on all collateral for that event (website, email, social media, event programme).

Also included is the option of an opening address, a priority 'speed dating' slot, a trestle table to showcase your organisation and two complimentary registrations.

With this sponsorship package you will have maximum exposure to an engaged and active adviser audience in your region.

EXHIBITION SPONSOR

This sponsorship provides a meeting space to connect with advisers at the event. It allows for you to set up a table with your branding and collateral.

Due to limited sponsorship opportunities available, these will be allocated on a first come, first served basis. Sponsorship pricing varies per location due to capacity and expected numbers (see page 7 for more details).

Increase your brand exposure and foster a positive reputation.

Build business relationships with opportunities to network and connect with professional advisers who are active in your region.

Gain valuable insights - sector trends and updates, as well as how to achieve best outcomes for advisers and their clients.

20 Sponsorship 23 opportunities.

FROM \$2000

GOLD SPONSOR

-
- One gold sponsor per event
 - Sole naming rights to your sponsored event & collateral
 - Opening address
 - Priority speed dating slot (March Event)
 - Opportunity to provide pens & pads
 - Two free registrations (For each location sponsored)
 - One trestle table

FROM \$200

EXHIBITION SPONSOR

-
- One trestle table
 - Priority Speed dating slot (March Event)
 - One free registration (For each location sponsored)

\$5,000

COFFEE CART SPONSOR

-
- Priority Speed dating slot (March Event)
 - One free registration (For each location sponsored)
 - Auckland - March event only

2023 Sponsorship pricing.

SERIES 1 - MARCH

REGION	DATE	ESTIMATED ATTENDANCE	GOLD	EXHIBITION
Auckland	10 March	200	\$5,000 SOLD	\$500
Cambridge	16 March	60	\$3,000	\$300
Palmerston North	23 March	40	\$2,000	\$200
Wellington	24 March	50	\$3,000 SOLD	\$300 SOLD
Christchurch	30 March	80	\$3,000 SOLD	\$300
Queenstown	31 March	40	\$2,000	\$200 SOLD

SERIES 2 - AUGUST

REGION	DATE	ESTIMATED ATTENDANCE	GOLD	EXHIBITION
Auckland	1 August	200	\$5,000 SOLD	\$500
Cambridge	3 August	60	\$3,000 SOLD	\$300
New Plymouth	10 August	30	\$2,000 SOLD	\$200
Wellington	15 August	50	\$3,000 SOLD	\$300 SOLD
Napier	17 August	30	\$2,000 SOLD	\$200
Christchurch	24 August	80	\$3,000 SOLD	\$300 SOLD

What's in the box?

SERIES 1 (MARCH)

- 9.00am** Economic update
- 10.00am** Legislation and regulations update
- 10.30am** The Professional Liability Insurance environment
(including Professional Indemnity Insurance)
- 11.00am** Morning tea
- 11.30am** Speed dating
- 12.15pm** Motivational business speaker
- 1.00pm** Lunch

*This is a draft agenda and subject to change

Agenda - series 1 (March)

9.00am – Economic update

We will have a variety of economic experts delivering an update to your region.

The discussion will transverse recent economic and political developments and outlook, including inflation, monetary policy, recession risk, and the broader geopolitical implications of the conflict in Ukraine, supply chain issues, housing and immigration. Depending on the speaker in the region there may also be an outlook for key asset markets and the implications for asset allocation.

10.00am – Legislation and regulations update

This session will provide you with the recent changes to both legislation and regulations which will impact on the advice that you provide to your clients and the environment which you operate within. This will include updates on CCCFA, CoFI (Guidelines for Sales Incentives), Regulatory Returns, Incorporated Societies Act and any other relevant changes.

As part of requirements to be a financial adviser you have to abide by the Code of Professional Conduct for financial advice services. This session will ensure you meet the requirements of keeping competency, obtaining knowledge and your skills up to date.

Leigh Hodgetts (Financial Advice NZ) brings significant knowledge from her roles at KAN, Kepa, Astute and the FMA. In addition to this, Leigh has been a Financial Adviser and a CFP. Leigh has a passion for professional development, lifting sector standards and ensuring financial advisers provide quality financial advice which can transform the financial health, wealth and wellbeing of New Zealanders.

10:30am - The Professional Liability Insurance environment

This session will provide you with an update on the Professional Liability Insurance environment for financial advisers with the most up to date information on where the risk has been for advisers over the last 12 months and what the future for the sector will look like. Clinton Stanger (Curated Risk) will also provide an update on the Financial Advice NZ Professional Insurance Liability Programme and will be available to answer your questions on the programme.

Clinton has worked in the New Zealand fire and general insurance industry for the past 24 years, in both underwriting and adviser roles. Clinton is passionate about the advice industry and assisting his clients by providing clear advice. He thrives on opportunities to utilise his strong relationship skills and wide personal networks to create growth and opportunity for himself and his client's businesses. He is Level 5 qualified to give advice in fire and general, a member of Financial Advice NZ, and has the Trusted Adviser mark.

11:30am – Speed dating

Join this interactive and fun session of speed dating with a variety of product providers. This fast-paced format will allow you to speak directly with the people you do business with, or are considering doing business with, ask your important questions and hear about any new initiatives of value to you and your clients.

12.15pm – Motivational business speaker

We will be welcoming a different speaker in each region to share their story about what success has meant for them, how they got there and their plans for the future. These speakers have been selected as we believe they will give you some great tools and new ideas for your business and personal life.

What's in the box?

SERIES 2 (AUGUST)

- 9.00am** Economic update
- 10.00am** Political debate
- 10.30am** Morning tea
- 11.00am** Legislation and Regulation update
- 12.00pm** Good business practice
- 1.00pm** Lunch

*This is a draft agenda and subject to change

CONFERENCE 2022

Our 2022 IGNITE Conference brought great value to the many sponsors who supported our highly successful event. We are confident our 2023 sponsorship offering will also be very beneficial for all who partner with us in delivering our regional 2-part knowledge series.



500

ATTENDEES

98%

OVERALL SATISFACTION
WITH THE CONFERENCE

50

SPONSORS

94%

RATED THE EXHIBITION
AREA FOR SPONSORS
HIGHLY VALUABLE

"It was hands down one of the best conferences I been to for years. Everyone was delighted to get back together IRL after so long and the quality of speakers, venue, organisation- everything was great- Well done" - sponsor

"It was our first involvement and we couldn't be happier with the lead-up to conference and the team" - sponsor

"Was the best Financial Advice NZ conference so far" - sponsor

Application Form

Organisation:

Contact Person:

Postal Address:

Phone: Mobile:

Email:

Website:

Our company wishes to support the Out of the Box Tour 2023 (tick your selection as appropriate).
All costs are GST exclusive. GST #124 070 554.

Sub-total:	\$ <input type="text"/>
Total:	\$ <input type="text"/>

Name:

Signature:

Date:

Coffee cart Auckland (March) \$5,000

Email your sponsorship application form to jasmina.nagar@financialadvice.nz

REGION	DATE	GOLD		EXHIBITION	
Auckland	10 March	SOLD \$5,000	<input type="checkbox"/>	\$500	<input type="checkbox"/>
Cambridge	16 March	\$3,000	<input type="checkbox"/>	\$300	<input type="checkbox"/>
Palmerston North	23 March	\$2,000	<input type="checkbox"/>	\$200	<input type="checkbox"/>
Wellington	24 March	SOLD \$3,000	<input type="checkbox"/>	SOLD \$300	<input type="checkbox"/>
Christchurch	30 March	SOLD \$3,000	<input type="checkbox"/>	\$300	<input type="checkbox"/>
Queenstown	31 March	\$2,000	<input type="checkbox"/>	SOLD \$200	<input type="checkbox"/>

REGION	DATE	GOLD		EXHIBITION	
Auckland	1 August	SOLD \$5,000	<input type="checkbox"/>	\$500	<input type="checkbox"/>
Cambridge	3 August	SOLD \$3,000	<input type="checkbox"/>	\$300	<input type="checkbox"/>
New Plymouth	10 August	SOLD \$2,000	<input type="checkbox"/>	\$200	<input type="checkbox"/>
Wellington	15 August	SOLD \$3,000	<input type="checkbox"/>	SOLD \$300	<input type="checkbox"/>
Napier	17 August	SOLD \$2,000	<input type="checkbox"/>	\$200	<input type="checkbox"/>
Christchurch	24 August	SOLD \$3,000	<input type="checkbox"/>	SOLD \$300	<input type="checkbox"/>

LET'S STEP OUT OF THE BOX AND MAKE AN IMPACT!

*Learn more about our sponsorship
opportunities and be a part of this
unique adviser event*

20
23

0800 432 101
www.financialadvice.co.nz
info@financialadvice.nz

TERMS AND CONDITIONS

EXHIBITION STANDS ALLOCATION

- Financial Advice New Zealand will allocate your stand number and advise placement one week prior to the event

PAYMENT DETAILS

- An invoice will be issued on receipt of your sponsorship application.
- Exhibition Sponsor Full payment is due within 10 days of invoice.
- Gold Sponsor 50% deposit is due within 10 days of invoice.
- The balance is due by 10 working days prior to the event and must be paid in full prior to the event.
- Cancellation – should your company cancel, the following fees will apply:
25% cancellation fee if cancelled prior to 30 working days from the sponsor date booked. 50% cancellation fee if cancelled prior to 4 working days from the sponsor date booked. Thereafter, any refund is at the discretion of Financial Advice New Zealand.

INSURANCE

- All insurance is the responsibility of you / your company or organisation. Financial Advice New Zealand, accept no liability or responsibility for death or illness, or injury / accident to or financial loss by any person attending the event or exhibition, whatever the cause.

CONTACT DETAILS

If you would like to discuss or sign up for a sponsorship opportunity, please contact event organiser:
Jasmina Nagar
jasmina.nagar@financialadvice.nz
0800 432 101

Financial Advice
NEW ZEALAND