



ARRIVAL AND MORNING COFFEE IN THE MARKETPLACE

Meet other Financial Advisers and visit providers that can give you practical hints and tips on getting ready for the changes in the Marketplace.



SESSION 1: Open and welcome from Hon Dr David Clark, Minister for Commerce and Consumer Affairs



SESSION 2: Embedding the changes in the New Zealand Advice Sector

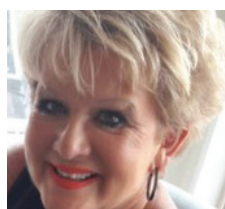
Our update session on the Financial Services Legislation Amendment Act (FSLAA), Conduct of Financial Institutions Review (CoFI) and consumers. Hear directly from the key players driving, leading and implementing the new regulations in the first panel, followed by Q&A.



ANGUS DALE JONES
Chair
Code Working Group



DEREK GRANTHAM
Principal Consultant
Financial Markets
Authority



TRISHA EDMONDS
Head of Advisory
Distribution
ANZ



JOHN BOTICA
Director of Market
Engagement
Financial Markets
Authority



SHARON CORBETT
Manager Financial
Markets
MBIE



IN THE SPOTLIGHT: Money & You and Adviser Research

Find out more about the latest Financial Services Council consumer and adviser research, Money & You and the Financial Resilience Index.



REFRESHMENTS IN THE MARKETPLACE

Meet other Financial Advisers and visit providers that can give you practical hints and tips on getting ready for the changes in the Marketplace.



SESSION 3: Financial Literacy, Financial Capability & Financial Advice

What should we do differently as a sector? Our panel will look at how the sector can work together and create opportunities to improve consumer capabilities and experiences in seeking financial advice, followed by Q&A.



RYAN KOPPENS
Head of Adviser
Networks
Southern Cross



MATT RAEBURN
Senior Policy Analyst
Ministry for the
Environment



JACK BISSET
Principal Advisor
Ministry for the
Environment



PETER LEITCH
Authorised Financial
Advisor
SHARE



GEORGIE MILES
Head of Advice
Advice First



KATRINA CHURCH
Director and
Co-Founder
Insurance People



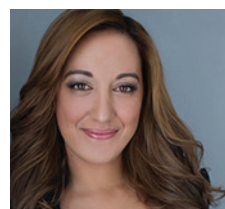
NEVILLE CAIRD
Authorised Financial
Advisor New Zealand
Financial Planning
Queenstown &
Dunedin



RUSSELL HUTCHINSON
Principal
Chatswood
Consulting



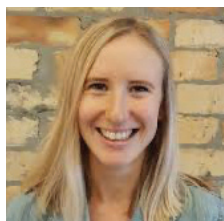
CHRIS BOON A.F.A.
Managing Director
Adelphi Insurance
Brokers



CAMILLA TUMAI
Founder & Director
IKONIK

SESSION 4: Helping New Zealand's advisers to grow – tools, tips and insights

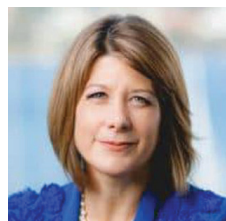
Looking to develop your advice practice? These fast-paced TED-style talks from our experts will provide insights to help you grow your advice business.



CLARISSA HIRST
Content Manager
Financial Services Council



JULIA NEWBOULD
Money Magazine Editor &
The Joy Of Money Author



KATE MCCALLUM
Financial Advisor &
The Joy of Money Author



SUMMIT CLOSE AND ONE LAST VISIT TO THE MARKETPLACE

One more opportunity to visit the marketplace and get the advice you need.



OPTIONAL: Licensing, Disclosure and Advice Masterclass

This practical workshop style masterclass will help you to improve your business in governance and compliance. The session will provide practical examples, compliance tips, process templates and will reiterate what it really means to run an adviser business. The masterclass will be led by Mark Banicevich and feature specialists from the 2020 Get In Shape webinar series who will be there to help you navigate the masterclass.



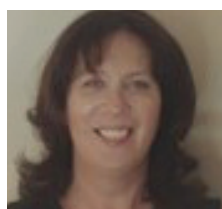
DAVID IRELAND
Partner
Dentons Kensington
Swan



TRACEY CROSS
Partner
DLA Piper



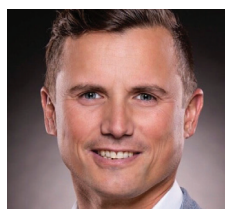
MARK BANICEVICH
Head of Industry
Engagement
Partners Life Limited



KARTY MAYNE
Compliance
Consultant & Director
Rosewell Consulting



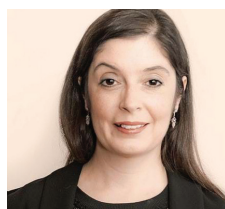
NICK SUMMERFIELD
Partner
Anthony Harper



PENNY SHEERIN
Partner
Chapman Tripp



STEVE BURGESS
Director
Compliance Refinery



DAVID GREENSLADE
Executive Director
Strategi



JEREMY MUIR
Partner
MinterEllisonRuddWatts