

Growing

FINANCIAL

CONFIDENCE & WELLBEING
IN AOTEAROA

SPONSORSHIP OPPORTUNITIES

Conference 2022

THE CORDIS HOTEL, AUCKLAND | 21 & 22 SEPTEMBER 2022

Financial Services
Council NZ



**GROW THE FINANCIAL
CONFIDENCE AND
WELLBEING OF
NEW ZEALANDERS**

FSC.

WELCOME

Dear Partners,

Thank you to all our sponsors for your continued support, hello to potential new sponsors and a warm welcome to the sponsorship opportunities for the 2022 Financial Services Council conference.

Working together with sponsors enables us not only to deliver flagship events and conferences in the sector known for leading edge content and speakers, but also contribute to the success of the wider financial services community and create better financial outcomes for all New Zealanders.

The financial services sector touches all New Zealanders, through life and health insurance, investments and KiwiSaver and as we undergo regulatory, technology and market change, we continue to adapt to the environment and help Kiwis learn the language of money to grow and protect their wealth in our ever-changing global world.

2020 and 2021 were both challenging years as New Zealand and the world grappled with COVID-19 and saw our conferences go fully digital. In September this year we are excited to bring the community back together safely at the Cordis Hotel, Auckland. Health and Safety is our priority and we have put robust governance in place to help us do so. We will, of course, continue to work within Government guidelines and add in safeguards for sponsors and the event.

We are well on track to curate and create the conference for 21 and 22 September 2022. This year we are developing more opportunities across the year for those in and supporting the sector to get in front of decision makers from the adviser community, restricted schemes, KiwiSaver, Life and Health Insurance and investment communities as well as those organisations that support them. Whilst we are planning this to be a face to face event, we are also planning live digital streams, creating access for all.

The FSC created [FSC Connect](#), our response to keeping the financial services community updated through regular updates and our webinar programme. As we continue through 2022, we are planning to continue to deliver FSC Connect, and there are opportunities for sponsorship of these sessions alongside other opportunities.

Great content drives great events, and in 2022 we will again showcase across our event series, New Zealand's political and regulatory leaders and explore the big issues of the day across topics of interest for our membership and New Zealanders.

We look forward to working with you to bring the FSC. Conference to life in 2022.

The FSC Conference Committee

CONFERENCE TEAM



Donna Mason



Chris Hutton



Neisha Livermore



Joe Turnbull



Vanja Thomas



Mark Banicevich



Helen Davies



Martin Gould



Penny Sheerin



Robert Sloan



Clarissa Hirst



David Boyle



Sharon Mackay



Daniel Relf



Leigh Bennett



Rob Kingston



Yvonne Davie



David Tikao



Shelly Peebles



Richard Klipin



David Bishop



James Brown



Jason Roberts



Russell Hutchinson

DELIVERED IN 2021

INDUSTRY BEST PRACTICE

142 WEBINARS

17 IN-PERSON EVENTS

VIRTUAL ATTENDEES:

4,324 REGENERATIONS
CONFERENCE 2021
COMPARED TO **1,553**
ATTENDEES AT **GENERATIONS**
CONFERENCE 2020

POLICY, REGULATION AND ADVOCACY

100+ MEETINGS WITH GOVERNMENT
AND REGULATORS

22 SUBMISSIONS

2 SELECT COMMITTEES

12 EDITIONS OF THE REGULATORY
OUTLOOK

COMMUNITY OF PROFESSIONALS

14 STANDING COMMITTEES

11 PROJECT-BASED
WORKING GROUPS

400+ MEMBERS
INVOLVED

CONSUMER



NEW CONSUMER INITIATIVE MONEY AND YOU

12 CONSUMER BLOG ARTICLES
PUBLISHED

5 CONSUMER FOCUSED OP-EDS

CONSUMER PROJECTS FEATURED ON
TVNZ AND AM SHOW

WHY DOES MONEY MATTER SCHOOL
COMPETITION LAUNCHED

LEADERSHIP & INSIGHT

48 MEMBER UPDATES

23 MEDIA RELEASES

6 DISCRETE RESEARCH PIECES

4 KIWISAVER, LIFE AND HEALTH
INSURANCE STATS

7 GET IN SHAPE UPDATES

2021 AND BEYOND

The Financial Services Council's vision is to be The Voice of the Financial Services Industry and our strategic intent is to ensure strong and sustainable consumer outcomes, sustainability of the financial services sector and increasing professionalism and trust of the industry.



WHY PARTNER IN 2022?

1 A marketplace to showcase your business, products and services

Different businesses need different ways to showcase themselves to their audiences. The flagship events and conferences provide a flexible space to deliver innovative communications, and the theme provides the opportunity to innovate and show products and services through a different lens.

2 Access to a network of the who's who in Financial Services

We are continuously growing our reach across the financial services sector and its supply chain, and are expecting over 5000 delegates across our 2022 events alone. Our 2021 digital conference saw 4,324 live attendees. Delegate numbers continue to grow. In 2019 we attracted 615 delegates at our face to face Towards Wellbeing Conference, 200 more than in the previous year.

We reach a diverse group of product manufacturers, distributors and suppliers who support the financial services sector as well as politicians and regulators.

Not only will sponsors get the opportunity to be face-to-face with the community, through events such as conference, there is also the opportunity through other FSC channels to showcase your business.

3 Nationwide Coverage

We also promote our activities through national and trade media. In 2021 our events and activities featured on TV, radio, national and trade media, with growing engagement on social media which we will continue to build in 2022.

4 Flagship conference in September 2022

Providing leading edge, global and market insights, the conference delivers a combination of high profile and quality keynote speakers and presenters. With plenary and specialist workstream sessions, it give delegates the opportunity to hear first-hand from experts, gaining access to real-time political insights and the latest thinking on global challenges.

The programme combines professional and personal development, providing tangible value for delegates.

5 Exhibition and Sponsorship Opportunities

We are flexible and collaborative, our events team are happy to develop options and to work with you. If you would like to showcase your brand at the FSC conference with an exhibition booth, or a bespoke sponsorship package, let's chat.

6 Annual Awards Programme

We are delighted to present the industry awards at a gala dinner on the first night of the conference. 2022 will see the introduction of new awards categories which will showcase excellence and industry best practice, the movers and shakers and the rising stars.

The Gala Dinner and Awards evening provides an opportunity for both brand promotion and for sharing knowledge among peers. It is an excellent opportunity to network, enjoy the social scene and the full conference experience.

SPONSORSHIP OPTIONS

DIAMOND	PLATINUM	GOLD	SILVER
<p>The Diamond package is reserved for the Financial Services Council's closest partners through the year.</p> <p>It gives access to the full range of growing FSC markets including Financial Advisers, Consumers and the wider financial industry eco-system.</p>	<p>The Platinum package is reserved for organisations that want a presence in front of the core FSC audiences.</p> <p>It gives VIP access and opportunities across the two major events in 2022.</p>	<p>The Gold package is reserved for smaller organisations that would like to have presence with the key audiences</p> <p>It also allows for the creation of bespoke events.</p>	<p>The Silver package gives the opportunity for those organisations who want to get in front of the FSC community, face to face.</p>
AVAILABLE: 1	AVAILABLE: 3	AVAILABLE: 6	AVAILABLE: 10
CONFERENCE: \$40,000	CONFERENCE: \$30,000	CONFERENCE: \$20,000	CONFERENCE: \$10,000

SPONSORSHIP TIER BENEFITS	DIAMOND	PLATINUM	GOLD	SILVER
FLAGSHIP CONFERENCE				
Sponsor recognition	Headline	✓	✓	✓
Exhibition booth	Priority	✓	✓	✓
Complimentary guests + Gala Dinner (value \$1600pp)	6	4	2	x
Exhibitor passes	6	4	2	2
Pick and Mix and bespoke options	Priority	✓	✓	✓
Recognition in event communications	Priority	✓	✓	✓
Speaker opportunity	Priority	✓	✓	x
Delegate gifts	Priority	✓	✓	x
Digital advertisements (at event)	Priority	✓	✓	x
OTHER BENEFITS				
Branding rights across the year	Priority	✓	x	x
Articles/advertise in FSC materials opportunity	Priority	✓	✓	✓
Research sponsorship opportunity	Priority	✓	✓	✓

PICK + MIX PRICING

To supplement and develop your package to meet your bespoke needs, or for those that would like to choose a difference level of sponsorship, we have a pick and mix selection.

OPPORTUNITIES AVAILABLE AT BOTH EVENTS	
Conference Newsletter	\$5,000
Morning/Afternoon Tea	\$4,000
Exhibition Booth	\$4,000
Conference Lanyard	\$4,000
Coffee Station Partner	\$4,000
Water Station Partner	\$4,000
Juice Bar Partner	\$4,000
Food Station Partner	\$4,000
Conference Bag	\$5,000
Political/Event Series sponsorship	\$5,000 per event
VIP Event	\$6,000
Delegate App	\$6,000
Awards sponsorship	By negotiation
Breakfast Masterclass/es	By negotiation
Gala Dinner	By negotiation
Digital Stream Sponsorship	By negotiation
Tech Alley	By negotiation
Made in New Zealand Sponsorship	By negotiation
FSC Connect Events Sponsorship	By negotiation
Group ticket bookings	By negotiation
At event advertising	By negotiation

SPONSORSHIP OPTIONS

Quality content drives great conferences and in 2022 we will again provide a platform for leading edge content. The Conference will have main platform sessions, along with Insurance, Investment and Generations workstreams and specific pathways for communities within the Financial Services sector.

Main Platform



On our main platform we will again showcase New Zealand's political and regulatory leaders, and explore the big issues of the day including our pre-election political series, conduct and culture discussions and look ahead to the future of the sector.

Workstreams



Growing Financial Confidence & Wellbeing

The 2022 FSC. Conference theme reflects the FSC. Vision to 'Grow the Financial Confidence and Wellbeing of New Zealanders'.



Life & Health Insurance

Sessions will explore how data and medical innovations are revolutionising the industry and engage with how to connect with customers whilst providing sustainable products.



Investment, KiwiSaver and Retirement

Expert speakers will look into the behaviour of switching, what we have learnt from COVID-19 and how the digital world is changing the face of distribution.

Pathways



LADUCA (CLAIMS AND UNDERWRITERS)

This stream will look at issues of diversity and claims management, and underwriting through crises.



PROFESSIONAL ADVICE

With the sector undergoing significant change, this stream will tackle issues faced by Professional Advice businesses.



LITS AND WORKPLACE SCHEMES

This stream will explore a range of topics relating to LITS and the Workplace Savings community.



FINTECH

This stream will investigate the role of tech in the life insurance and wealth value chain.



EMERGING LEADERS

This stream is targeted at connecting world class speakers with the leaders of tomorrow.



TRUSTEES AND SUPERVISORS

This stream will cover key issues facing trustees, supervisors and their clients.

CONFERENCE SNAPSHOT

PAST DELEGATE NUMBERS, COMPOSITION AND FEEDBACK

CONFERENCE ATTENDEES



149 AVERAGE PER SESSION

148 SPEAKERS 37 SESSIONS

TOP 5 WEEKLY SESSIONS

SESSION 1 - Reflections of the Regulator: Looking Backwards and Forwards

SESSION 2 - The Future of Financial Advice

SESSION 11 - CoFI in Focus: Implementing the Conduct of Institutions Legislation. What challenges do they hold for the sector?

SESSION 7 - The Rise and Power of the Retail Investor. How is retail investing reshaping markets?

SESSION 6 - The Protection Gap: Bridging it means better consumer engagement

AVERAGE

WHAT DID YOU THINK OF FSC. CONFERENCES?

Quality of presentations	86%
Relevance of presentations	85%
Coverage of topics	86%

DEMOGRAPHICS OF ATTENDEES

Male	59%
Female	41%

AGE GROUP

21-40	28%
41-60	60%
60+	12%

OCCUPATION

Government/Regulator	7.7%
CEO	3.8%
Executive Manager	15.4%
Manager	23.1%
Supervisor	11.5%
Adviser	15.4%
Other	23.1%

REGION

Auckland	66%
Wellington	18.8%
Rest of North Island	6.3%
South Island	4.2%

2021 SNAPSHOT

“ Thanks for putting on the conference today and yesterday, it has really been brilliant with some amazing speakers ! I especially enjoyed the following presentations, which were all highly relevant:

- The Value of Financial Advice in Life Insurance; and
- Closing Keynote with Mitchell Pham.

Rishad Paul Smartt, Senior Risk Manager
The New Zealand Automobile Association Incorporated



“ I learnt a lot from being on this panel to discuss whether New Zealand should have a Stewardship Code - the short answer is yes! Thanks to the FSC for inviting me to participate and to the other panel members for their fascinating insights.

Jenny Cooper, Queen's Counsel

“ Seamless online delivery. The regular sessions leading up to the conference days were great – it was a more integrated experience that extended the period of learning and engagement.

Leigh Bennett, Fidelity Life



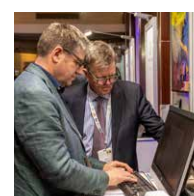
GET IN TOUCH

Find out more about our sponsorship opportunities, follow us on twitter @FSC__NZ and get in touch with us to discuss your ideas, thoughts and needs.

Alongside the events and conference, we have a number of event series, research and other opportunities through the year. Get in touch and let's talk about creating a sponsorship package that helps you deliver to your organisational needs.

We look forward to working with you and developing a strong platform for your business to reach the industry through the conference and other opportunities across the FSC.

Contact Richard Klipin or Helen Davies on 09 802 1532 or at fsc@fsc.org.nz



TERMS & CONDITIONS

FINANCIAL SERVICES COUNCIL OF NEW ZEALAND INCORPORATED CONFERENCE SPONSORSHIP PROSPECTUS 2022

1. Parties:

Upon receipt of a letter of sponsorship (Sponsorship Letter) from the Financial Services Council of New Zealand Incorporated (the Organiser, we, us) outlining the scope of sponsorship, a signed copy is required to be returned to the Organiser, along with the sponsorship fee, subsequently rendering the recipient a sponsor (the Sponsor, you, your) for the event named in the Sponsorship Letter (the Event).

2. Sponsorship Agreement:

These terms and conditions from the Organiser are to be read in conjunction with the Sponsorship Letter and the FSC. Conference 2022: Growing Financial Confidence and Wellbeing in Aotearoa Sponsorship Prospectus 2022 and from the agreement between the parties (the Sponsorship Agreement).

3. Use of organiser event materials

As a Sponsor you have the right to a non-transferable, non-exclusive, royalty free licence to use the Event logos and trademarks (the Event Marks) provided to you solely to promote your sponsorship of the Event, upon entering into this Sponsorship Agreement until such reasonable time following the Event (the Term) and in accordance with the Sponsorship Agreement.

The Organiser will record the Event through filming and photography and reserve the copyright to all materials recorded in this manner. Request for footage by any sponsor will be reviewed on a case by case basis.

4. Use of sponsor logo and promotion

You grant to the Organiser, a non-exclusive, royalty free, sub-licence to use your logos and trademarks (the Sponsor Marks) provided to us as part of this Sponsorship Agreement, including promotion across all Event materials and will provide them to the Organiser as part of this Sponsorship Agreement.

You undertake to support the Event through appropriate marketing and promotional channels and to collaborate with us on any appropriate joint marketing or promotional projects relating to the Event. The Organiser accepts no responsibility for the accuracy or content of any statements whether written or orally made by speakers in connection with the Event.

5. Sponsorship Benefits

If for any reason, the Organisers are unable to deliver any of the benefits of sponsorship (Sponsorship Benefits) as detailed in the Sponsorship Letter, we will inform you as soon as reasonably practicable. We may offer substitute Sponsorship Benefits in respect of the same Event to an equivalent value with your acceptance without any liability to you.

6. Costs associated with sponsorship

As a Sponsor, you acknowledge and agree that you shall be solely responsible for all costs that you incur relating to your attendance at the Event, including, without limitation, any travel and accommodation costs, the costs of any temporary staff and any costs relating to any materials or equipment used at the Event.

7. Loss or Damage

The Organiser, the Event venue and the Event management committee, will not be responsible for any loss or damage to the Sponsor's property. All Sponsor's material and equipment is the sole responsibility of the Sponsor.

8. Insurance Requirements

The Sponsor shall procure all appropriate insurance cover in relation to all activities and undertakings as a result of the Event at the cost of the Sponsor and a certificate of insurance shall be made available to the Organiser on request. The Organiser, the Event host body and Event management committee, their agents and their employees and the Event venue act as only organisers of the Event and subsequent activities and do not accept any responsibility for any acts, accidents, or omissions on the part of service providers.

9. Sponsor activities, displays and demonstrations

All Sponsor activities shall remain in keeping with the dignity and the atmosphere of the Event and the Organiser retains the right to reject any display or demonstration, which does not achieve this objective. Microphones and sound amplifiers will be permitted only as long as they cause no disturbance to neighbouring sponsors or attendees of the Event.

The Organiser or its authorised agent shall be the sole judge as to whether there is a disturbance being caused to any party.

10. Privacy Policy

In registering as a Sponsor for this Event, relevant sponsor details will be incorporated into a delegate list for the benefit of all delegates (including the name and organisation of the Sponsor) and may be made available to parties directly related to the Event, including all employees, contractors and board members of the Organiser, the Event venue and accommodation providers and other sponsors. The Organiser will also promote sponsors through its communication channels as part of the overall Event promotion. The Sponsor may seek amendment to these details by the Organiser at any time. The Event will be recorded, filmed and photographed. Media will also be invited to the Event. It is the Sponsors responsibility to manage their content accordingly.

Relevant Supporter details will also be made available to the Event venue pursuant to the COVID-19 Protection Framework.

In all other respects the FSC Privacy Policy applies.

11. Sponsorship Fee

An invoice for your sponsorship fee is included with your Sponsorship Letter (Sponsorship Fee). If the Sponsorship Fee is not received by us when due, we reserve the right not to supply, or cease to supply, any or all of the Sponsorship Benefits.

For the avoidance of doubt, sponsors shall not be permitted entry to the Event unless full payment has been received by us.

12. Cancellation, postponement and Force Majeure Event

The Organiser will use their best endeavours to ensure the supply of services to the Event, but it shall not be liable for any loss, damage or expense incurred by the Sponsor, for any failure or delay in performing our obligations under this Sponsorship Agreement as a result of an event or series of connected events outside of our reasonable control and or the reasonable control of our sub-contractors and or suppliers as applicable, including, without limitation, strikes or other industrial disputes, failure of a utility service or transport network, act of God, war, riot, civil commotion, terrorism, malicious damage, compliance with any law or governmental order, rule, regulation or direction, accident, breakdown of plant or machinery, fire, flood or storm or pandemic (Force Majeure Event).

For the avoidance of doubt, a Force Majeure Event includes a COVID-19 order imposed pursuant to a COVID-19 Public Health Response Order, including any Order Amendments or amendments to the COVID-19 Protection Framework (Traffic Light System), that prohibits the holding of the Event or associated events in the Auckland region up to and including the dates of the Event.

It may be necessary for us to alter the advertised content, timing, date and or location of the Event. We reserve the right to do this at any time following the commencement of the Sponsorship Agreement to the

date of the Event and without liability to you, provided that the Event, as altered, is substantially similar to Event as originally advertised. We will provide you with notice of any alterations as soon as is reasonably practicable. We reserve the right to cancel the Event at any time up until the date of the Event and will provide you with notice of the same as soon as is reasonably practicable. In the event that we cancel the Event or materially alter the advertised content, timing, date and or location of the Event, you shall be entitled to either:

- (i) a credit for a future event held by us of your choice (up to the value of sums paid by you in respect of the Event); or
- (ii) terminate this Sponsorship Agreement with immediate effect and obtain a refund (calculated in good faith) of an amount that reflects the total sums paid by you at the date of cancellation minus the value of any benefits received by you in accordance with the Sponsorship Letter prior to the date of cancellation. Any such refund shall be paid by us within 30 calendar days of receipt of confirmation from you of your wish to terminate this Sponsorship Agreement.

13. COVID-19 Protection Framework

The Organiser and all sponsors, delegates, and contractors of the Event are required to comply with any Event venue requirements, including the provision of a valid My Vaccine Pass (or similar approved vaccination certificate) and personal identification (if required), and adhere to all requirements as per the New Zealand Government's protocols for the applicable Traffic Light Level in force at the time of the Event.

14. Termination

Either party has the right at any time to terminate this Sponsorship Agreement immediately by giving written notice to the other in the event that the other:

- has committed a material breach of any of its obligations under this Sponsorship Agreement and has not remedied any such breach (if capable of remedy) within fourteen (14) days of being required to do so by written notice; or
- ceases or threatens to cease to carry on business, is unable to meet its debts as they fall due, has an order made or a resolution passed for its winding-up, has an administrator, receiver or manager appointed, makes any arrangement or composition with its creditors, or makes an application for the protection of its creditors in any way.

Termination of this Sponsorship Agreement by either party for any reason shall be without prejudice to any rights or obligations that may have accrued as at the date of such termination.

15. Liability

The Organiser aggregate liability to the Sponsor, whether such liability arises in contract, negligence or otherwise, for any damages, loss, costs, claims or expenses of any kind howsoever arising, out of or in connection with the Event, shall be limited to the Sponsorship Fee paid by you.

Financial Services Council NZ

© Grow the financial
confidence and wellbeing
of New Zealanders

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MARCH 2022