



Future Ready

ADVICE SUMMIT 2022

TUESDAY 14 JUNE 2022 | QUEENSTOWN

SPONSOR & MARKETPLACE OPPORTUNITIES

**Financial Services
Council NZ**

WELCOME

We are delighted to announce our June FSC Flagship event – **Future Ready Queenstown** and we would like to invite your sponsorship and involvement.

We were disappointed not to be able to bring you an in-person event in February, as you'll already be aware Covid19 scuppered our plans. The good news is that we are now preparing the event again for Tuesday 14 June 2022. This will be an all-day conference at the Heritage Hotel Queenstown. We held a taster of what's to come with the virtual event held on 17 February – [watch here](#).

Why Queenstown? We thought we could do our bit to help the regions, it is such a beautiful destination, and it's time to shake up the format from what we've run in previous years.

We have renamed the event to Future Ready – focusing on the future and all that will it bring. The venue is the lovely Heritage Hotel and is set for Tuesday 14 June so you can make the most of your time in the region to enable you to enjoy the local activities on the Monday, or you may like to stay for the weekend beforehand. We have a strict limit on numbers with a first-in-first-served basis but we will offer digital passes for those who are unable to join us in-person. We have already sold both in person and streamed tickets to this event, with more tickets on sale shortly.

Naturally our summit will look at regulatory changes and concentrate on the future and developing professional advice practices. Sessions will include a government and regulator lens as well as practical support designed to inspire attendees. Topics will include adviser resources, running your business, working with stakeholders to increase penetration through the financial advice industry, guidance notes, FSLAA, locum broker, Financial Markets Conduct Act, COFI and more.

Last year the 2021 Masterclass practical workshop on getting set to manage licensing and disclosure was the most popular session, with outstanding feedback, and we're planning something similar, but better, again this year.

The 2021 Advice Summits were a huge success thanks to our generous sponsors. We would like to thank you, our sponsors for your continued support as well as say hello to potential new sponsors. Welcome to Future Ready 2022, we are delighted to present to you 2022 sponsorship opportunities, with more to come!

The financial services sector touches all New Zealanders, through insurance, investments, KiwiSaver and lending. As we undergo regulatory, technology and market change, we continue to adapt to the environment and help Kiwis grow and protect their wealth in an ever-changing global world.

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

On a final note, we are living in uncertain times and in addition to the face to face events, we are offering a digital pass live from the Queenstown event. We will deliver the face to face events according to Government advice and all sponsorship and tickets will be transferable should we need to change the event timing.

We look forward to working with you in 2022.
The Future Ready Team



Trisha Edmonds



Mark Banicevich



Russell Hutchinson



Richard Klipin

WHY SPONSOR

This is an excellent opportunity to network and discuss your product or services face-to-face with people in the industry. We ran similar sell-out events over the past three years and have positive feedback about the involvement and engagement of sponsors.

The summit is designed to appeal to the 'whole of market':

- **Product suppliers – life, funds, KiwiSavers and lenders**
- **Educational colleges**
- **Dealer groups**
- **Software**
- **Legal firms**
- **Compliance firms**
- **Practice management firms**



2021 EVENT EVALUATION

TOTAL NUMBER OF DELEGATES

905

REGION

NORTH ISLAND		SOUTH ISLAND	
Auckland	452	Christchurch	91*
Wellington	172	Dunedin	52*

*Virtual attendees



Digital Stream

77



Online Bonus Session

61

73%

OF ATTENDEES WERE FINANCIAL ADVISERS
OR MEMBERS OF THE ADVICE COMMUNITY

HOW DID YOU RATE GET IN SHAPE?

80%

HOW DID YOU RATE THE SPEAKERS?

83%

Find out more at getinshape.nz

WHAT DID YOU ENJOY THE MOST?

Really enjoyed the movie making session, but also all the content was uplifting and positive ... appreciated that

Interacting with real people, not digitally

Hearing others concerns & the MP update

It was all useful and informative. I think the skilful facilitation of sessions and great MC contributed a lot. The various presenters were all terrific.

The clear and concise directions of the speakers as to the new regime

I think you guys have got things covered here, including tickets being texted the day before with the link, it was super easy thanks

Well organised event – quality speakers – face to face contact and networking opportunity to talk with other people and regulators and officials.

WHAT'S ON?

THE SUMMIT PROGRAM

The FSC are working with key players behind the regulatory change and peers within the advice community to deliver the program. The content will be future focused, relevant, reliable and will best prepare you for the financial services landscape in 2022 and beyond.

You are invited to learn, share and network with your peers at this summit, built specifically for the professional advice community.

By attending you will:

- Hear directly from our regulatory partners and key decision makers including the FMA and others
- Get the latest advice on thriving under a financial advice provider licence
- Engage & hear from some of our political leaders
- Hear from experts and focus on the future and developing professional advice practices
- Join our Advice Masterclass focused on future proofing the business model of the future
- Network with peers and hear from industry leaders
- Speak to suppliers for practical help and support through the changes
- Contribute towards your Code Standard 9 competence requirements

Following on from the popular 2021 event which attracted over 950 attendees, scored an average speaker rating of 84% and delivered insights from leaders including Minister Clark, our 2022 edition has a stellar programme line-up not to be missed.



AN UNMISSABLE PROGRAMME

Great content drives great events and across our 2022 event series, where we'll explore the big issues of the day across topics of interest of our members and New Zealanders. Featured sessions include:

SESSION 1: The Future of the Financial Services

Gain insights on the future of our industry on a global level, how the pandemic has changed the industry and outwitting, outlasting and outplaying in the sector. These fast TED-style talks feature Clayton Coplestone, Director of Heathcote Investment Partners, Terry Bell, Owner of Business Health and Clarissa Hirst, Head of Content at FSC. A fireside panel chat with Q&A opportunities will follow.

SESSION 2: Impacts and Opportunities with NZ Income Insurance Scheme

A discussion around the impacts and opportunities for consumers with the NZIIS.

SESSION 3: It Starts With Action – Protecting what matters

It Starts With Action is an industry-led campaign to improve the financial wellbeing of our wāhine. This session will focus on protecting what matters.

SESSION 4: Meet the Professionals

Your choice of two sessions to get up close with some of the leading lights of the NZ financial services sector including experts from business fields to help develop your financial advice practice. Such sessions include:

- **Boards, governance and codes** with Henry Lynch, Faraday & Company
- **Anatomy of a deal** with Russell Hutchinson, Chatswood Consulting
- **Client and customer wellbeing** with Kayleigh Woodings, Blue Mercury Leadership
- **Adviser mental health and wellbeing** with Sam Tremethick, AIA
- **Business branding** with James McKay Williams, Shotover Media
- **Digital marketing** with James Perry, Shotover Media

SESSION 5: Masterclass 2021 – Future Proofing your Business: Business Strategy, Governance, Pricing and CVPs (Client Value Propositions) with Henry Lynch, Co-founder and Director of Faraday & Company

Faraday & Company specialise in purpose-built, high performance professional advisory boards for emerging, small and mid-market enterprises, and Henry is a professional Advisory Board Chair, non-executive Director, Chartered Member of IoD, a Fellow of Governance New Zealand and an experienced CEO.

This practical workshop-style masterclass will help you to improve your business in governance, strategy and CVPs. The session will provide practical examples, tips, process templates and will reiterate what it really means to run an adviser business.

SESSION 6: Advice Summit Networking Function

A chance to have a chat, reconnect and close out the day. Join us for drinks and nibbles, meet with your peers, network and enjoy the gorgeous views of Lake Wakatipu.



Stay tuned as we reveal our outstanding line-up of speakers over the coming weeks. Topics, speakers and timing may change.

SPONSOR OPTIONS 2022

PLATINUM	GOLD	SILVER	
\$8,000	\$6,000	\$4,000	
AVAILABLE: 3	AVAILABLE: 3	AVAILABLE: 4	
BRANDING: <ul style="list-style-type: none">• Priority branding rights• First choice of pick & mix sponsorships• Inclusion in sponsor recognition across FSC social media channels for the Future Ready Advice Summits 2022 before, during and after the event• Recognition on event website, communications and at event SPEAKERS: <ul style="list-style-type: none">• Opportunity to provide a speaker DELEGATES: <ul style="list-style-type: none">• Complimentary tickets - eight VIP entry passes to the in-person event• 15 Digital Passes• Opportunity to purchase additional VIP guest passes at discount EXHIBITION: <ul style="list-style-type: none">• Market place exhibition table space• Three exhibitor passes	BRANDING: <ul style="list-style-type: none">• Priority branding rights• Choice of pick & mix sponsorships• Inclusion in sponsor recognition across FSC social media channels for the Future Ready Advice Summits 2022 before, during and after the event• Recognition on event website, communications and at event SPEAKERS: <ul style="list-style-type: none">• Opportunity to provide a speaker DELEGATES: <ul style="list-style-type: none">• Complimentary tickets - five VIP entry passes to the in-person event• 12 Digital Passes• Opportunity to purchase additional VIP guest passes at discount EXHIBITION: <ul style="list-style-type: none">• Market place exhibition table space• Three exhibitor passes	BRANDING: <ul style="list-style-type: none">• Branding rights• Pick & mix sponsorships• Inclusion in sponsor recognition across FSC social media channels for the Future Ready Advice Summits 2022 before, during and after the event• Recognition on event website, communications and at event DELEGATES: <ul style="list-style-type: none">• Complimentary tickets - three VIP entry passes to the in-person event• 10 Digital Passes• Opportunity to purchase additional VIP guest passes at discount EXHIBITION: <ul style="list-style-type: none">• Market place exhibition table space• Two exhibitor passes	
Networking Function	Masterclass	Digital Pass	Welcome Breakfast
\$4,000	\$4,000	\$4,000	\$3,000
AVAILABLE: 1	AVAILABLE: 1	AVAILABLE: 1	AVAILABLE: 1
<ul style="list-style-type: none">• Sponsor the end of day drinks at the Heritage Hotel, including a welcome message and branding throughout	<ul style="list-style-type: none">• Sponsor the afternoon masterclass session including a welcome message and branding throughout	<ul style="list-style-type: none">• Recognition on digital pass purchase pathway, pre-record advert / branded intro and outro to live streaming event	<ul style="list-style-type: none">• Sponsor the buffet breakfast at the Heritage Hotel, including a welcome message and branding throughout
Coffee	Marketplace stall only	Branded Newsletter	Covid19 Package
\$2,500	\$2,000	\$1,000	\$1,000
AVAILABLE: 1	AVAILABLE: 10	AVAILABLE: 0	AVAILABLE: 2
<ul style="list-style-type: none">• One branded barista coffee cart (consumables not included)	<ul style="list-style-type: none">• A space in the conference marketplace for morning tea, lunch and afternoon tea with two exhibitor passes	<ul style="list-style-type: none">• FSC send out regular EDM newsletter updates, sponsorship of the newsletter includes logo, hyperlink and advertisement	<ul style="list-style-type: none">• Sponsor to provide branded hand sanitiser or face masks direct to Heritage Queenstown

OUR SPONSORS

THANK YOU TO OUR GENEROUS SPONSORS, AND WE WELCOME THEM TO FUTURE READY.



GOLD



HEALTHIER, LONGER,
BETTER LIVES

partners life



SILVER

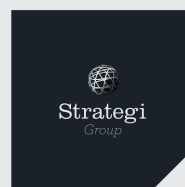


Asteron
Life

Chatswood
CONSULTING LIMITED
Financial Services Management Consulting



CONFERENCE PARTNERS



GET IN TOUCH

Find out more about our sponsorship opportunities, follow us on twitter [@FSC__NZ](https://twitter.com/FSC_NZ) and get in touch with us to discuss your ideas, thoughts and needs.

Alongside the **Future Ready summit**, 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 events and other opportunities across the FSC.

To find out more, contact Richard Klipin on **09 985 5762** or at events@fsc.org.nz



DETAILS

Hosted in beautiful Queenstown the 2022 Future Ready Advice Summit is designed to support the financial advice community over the Financial Services Legislation Amendment Act (FSLAA) and the transitional licensing to the new regime that started on 15 March 2021. In addition we will be running numerous learning opportunities and sessions, including the always-popular masterclass that helps attendees understand more about the New Zealand market and provides practical tips for improving advice businesses.

THE SUMMIT WILL BE HELD:

HERITAGE HOTEL QUEENSTOWN TUESDAY 14 JUNE 2022 | FROM 8.30AM

Heritage Hotel, 91 Fernhill Road, Queenstown 9300

THERE WILL ALSO BE A **LIVE DIGITAL OPTION** FOR ATTENDEES TO JOIN THE EVENT LIVE ONLINE ON THE DAY.



Book directly through the Hotel to access the Financial Services Council special conference rates.

Promotion Code FSC22 valid online for bookings made between 13th June to 16th June 2022 inclusive.

If you would like to check availability and/or book outside dates mentioned above with the Special Conference Rate, please do not hesitate to contact Heritage Queenstown - Conference Reservations on 03 450 1512 or conf.resqt@heritagehotels.co.nz

HERITAGE
QUEENSTOWN

2022 & BEYOND

As the voice of the sector, the Financial Services Council is a non-profit member organisation with a vision to grow the financial confidence and wellbeing of New Zealanders. FSC members commit to delivering strong consumer outcomes from a professional and sustainable financial services sector.

Our members manage funds of more than \$95bn and pay out claims of \$2.8bn per year (life and health insurance). Members include the major insurers in life, health, disability and income insurance, fund managers, KiwiSaver and workplace savings schemes (including restricted schemes), professional service providers, and technology providers to the financial services sector.



T&C'S

FINANCIAL SERVICES COUNCIL OF NEW ZEALAND INCORPORATED FUTURE READY ADVICE SUMMIT 2022 TERMS AND CONDITIONS

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 Future Ready Sponsorship Prospectus 2022 and form 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, excluding those of the Event venue (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 sponsor 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 and any associated events up to and including the date 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 the 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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MAY 2022