



# Future Ready



## ADVICE SUMMITS 2023

AUCKLAND | WELLINGTON | CHRISTCHURCH | DUNEDIN

SPONSOR & MARKETPLACE OPPORTUNITIES

AUCKLAND	15 FEBRUARY 2023
WELLINGTON	16 FEBRUARY 2023
CHRISTCHURCH	21 FEBRUARY 2023
DUNEDIN	22 FEBRUARY 2023

**Financial Services  
Council NZ**

# WELCOME

We are delighted to announce our FSC flagship roadshow event – **Future Ready 2023**, and we would like to invite your sponsorship and involvement.

We are excited to return with our in-person professional financial adviser summits across four locations. This Future Ready summit is designed to help all the advice community, whether a larger provider or individually licensed adviser, get ready for the next stage of the licensing journey, regulatory reporting.

***“From 16 March 2023, anyone who gives regulated financial advice to retail clients will need to have a Financial Advice Provider (FAP) full licence or be engaged by a FAP with a full licence or an Authorised Body as a financial adviser or nominated representative. If you give financial advice after 16 March 2023 but haven’t got a FAP full licence or don’t work for someone that does, you may be breaking the law.”***

At the summits, we are continuing the journey to support the advice community through the regulatory changes since our first adviser summits ‘Navigating Regulation’ back in 2017 and our ‘Get In Shape’ series in 2020/21, and of course, gives us a much-needed

opportunity to reconnect and learn together. This summit focuses on life after licensing, and how advisers can improve their businesses whilst complying with the regulatory returns that will be required by the FMA.

The 2022 Advice Summit was 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.

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 2023 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.

We look forward to working with you in 2023.  
**The Future Ready Team**



## AUCKLAND:

**Eden Park**

Wednesday 15 Feb 2023



## WELLINGTON:

**Sky Stadium**

Thursday 16 Feb 2023



## CHRISTCHURCH:

**Christchurch Town Hall**

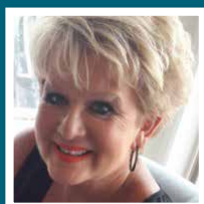
Tuesday 21 Feb 2023



## DUNEDIN:

**Dunedin Town Hall**

Wednesday 22 Feb 2023



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**



# 2022 EVENT EVALUATION

## TOTAL NUMBER OF DELEGATES

344

## EVENT DETAILS

FEBRUARY		JUNE	
IN PERSON	0*	IN PERSON	79
VIRTUAL	188	VIRTUAL	77

\*Held online only due to Covid-19 restrictions

## SESSIONS OVERALL AVERAGE

3.9/5

Session 1	4.2/5
Session 2	3.8/5
Session 3	3.9/5
Session 4	3.6/5
Session 5	4.2/5
Session 6	3.5/5

Find out more at [Future Ready](#)

## WHAT DID YOU ENJOY THE MOST?

These types of events are really key especially to those smaller teams where there's not a great opportunity to engage with others in the industry.

Short, sharp, interesting, interactive. Future of advice, regulator updates, industry topics.

I like that there was no beating around the bush. Change is coming, it won't be pretty but what do we need to do about it. The day was great and it's always great networking at these events.

Enjoyed Catherine Beard's candidness and honesty. The toolkit offered by Faraday is great.

The sessions where we were able to Meet the Professionals was very engaging, more of this would have been useful as it also allowed for exposure to other attendees at the same time and drew others away from their groups.

# WHAT'S ON?

## THE SUMMIT PROGRAMME

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 2023 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 about next steps from our regulatory partners and key decision makers
- Get a view on the macro-economic issues effecting your clients
- Meet national and local suppliers that can help you on your journey
- Join our practical masterclass focused on developing your regulatory reporting framework or meet the providers (invitation only for larger FAP businesses)
- Network with peers and hear from industry leaders
- Contribute towards your Code Standard 9 competence requirements through CPD hours.

We work with key players behind the regulatory change, product providers, FAP representatives and peers within the advice community to deliver this unmissable programme. The content will prepare you and your business with relevant, reliable, and practical support to succeed.





## 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: In conversation with the Regulator

Michael Hewes and Derek Grantham will update the Advice Summit attendees on full licensing and what's next on the journey after licensing from 16 March 2023.

### SESSION 2: The economy: Where next?

This panel will provide an up-to-date view of the economy, providing insight for you to support your clients through continuing turbulent times.

### SESSION 3: Getting your business Future Ready

Join this panel of professionals who will look to technology solutions to help you succeed in all elements of your business, including avoiding fishhooks for successful implementation.

### SESSION 4: Meet the professionals: Round 1

Your choice of sessions to get up close with local leading lights from the financial services sector and others support sectors to help develop your financial advice business. Businesses will range from software providers, compliance, marketers, researchers, client and sales specialists.

### SESSION 5: Meet the professionals: Round 2

A second session to get up close with another local leading light from the financial services sector and others support sectors to help develop your financial advice business. Businesses will range from software providers, compliance, marketers, researchers, client and sales specialists.

Stay tuned as we reveal our outstanding line-up of speakers over the coming weeks.

Topics, speakers and timing may change.

### SESSION 6: Learning from the industry young trailblazers

Get insights from the perspective of the new generation of advisers are building their businesses, working with tech to deliver, and overcoming building a client base, retention and industry wide issues like recruitment and motivating teams.

### SESSION 7: Masterclass

#### Life after Licensing: Future Ready your business

A practical session specifically designed for small and medium sized FAPs to start you and your businesses thinking and getting processes in place to take the strain out of yearly regulatory returns, maintain licensing requirements and be future ready.

#### Collaborating for success (by invitation)

A session designed for large FAP businesses that have their systems and processes in place, this session will bring FAPs and providers together to identify where they can work together to streamline and create common requirements. This session will also outline the FSC and how members work together to collaborate to grow the financial confidence and wellbeing of New Zealanders.



# SPONSOR OPTIONS 2023

<b>GOLD</b> <b>\$12,000</b>	<b>SILVER</b> <b>\$8,000</b>	<b>BRONZE</b> <b>\$6,000</b>
<b>AVAILABLE: 3</b>	<b>AVAILABLE: 6</b>	<b>AVAILABLE: 6</b>
<b>BRANDING:</b> <ul style="list-style-type: none"> <li>• Priority branding rights</li> <li>• First choice of pick &amp; mix sponsorships</li> <li>• Inclusion in sponsor recognition across FSC social media channels for the Future Ready Advice Summits 2023 before, during and after the event</li> <li>• Recognition on event website, communications and at event</li> </ul> <b>SPEAKERS:</b> <ul style="list-style-type: none"> <li>• Opportunity to provide a speaker</li> <li>• Opportunity to provide a Meet the Professionals representative</li> </ul> <b>DELEGATES:</b> <ul style="list-style-type: none"> <li>• Complimentary tickets - ten VIP entry passes to all four locations (valued at \$6000)</li> <li>• Opportunity to purchase additional VIP guest passes at discount</li> </ul> <b>EXHIBITION:</b> <ul style="list-style-type: none"> <li>• Market place exhibition table space at all four locations</li> <li>• Four exhibitor passes for all four locations</li> </ul>	<b>BRANDING:</b> <ul style="list-style-type: none"> <li>• Priority branding rights</li> <li>• Choice of pick &amp; mix sponsorships</li> <li>• Inclusion in sponsor recognition across FSC social media channels for the Future Ready Advice Summits 2023 before, during and after the event</li> <li>• Recognition on event website, communications and at event</li> </ul> <b>SPEAKERS:</b> <ul style="list-style-type: none"> <li>• Session sponsor for one of the morning sessions at all four events</li> <li>• Opportunity to provide a Meet the Professionals representative</li> </ul> <b>DELEGATES:</b> <ul style="list-style-type: none"> <li>• Complimentary tickets - ten VIP entry passes to two locations (valued at \$3000)</li> <li>• Opportunity to purchase additional VIP guest passes at discount</li> </ul> <b>EXHIBITION:</b> <ul style="list-style-type: none"> <li>• Market place exhibition table space at all four locations</li> <li>• Two exhibitor passes for all four locations</li> </ul>	<b>BRANDING:</b> <ul style="list-style-type: none"> <li>• Choice of pick &amp; mix sponsorships</li> <li>• Inclusion in sponsor recognition across FSC social media channels for the Future Ready Advice Summits 2023 before, during and after the event</li> <li>• Recognition on event website, communications and at event</li> </ul> <b>DELEGATES:</b> <ul style="list-style-type: none"> <li>• Complimentary tickets - ten VIP entry passes to two locations (valued at \$3000)</li> <li>• Opportunity to purchase additional VIP guest passes at discount</li> </ul> <b>EXHIBITION:</b> <ul style="list-style-type: none"> <li>• Market place exhibition table space at all four locations</li> <li>• Two exhibitor passes for all four locations</li> </ul>

<b>Hosted Table</b> <b>\$4,000</b>	<b>Masterclass</b> <b>\$5,000</b>	<b>Lanyards</b> <b>\$5,000</b>	<b>Table of 10</b> <b>\$800</b>
<b>AVAILABLE: 3</b>	<b>AVAILABLE: 1</b>	<b>AVAILABLE: 1</b>	<b>AVAILABLE: 20</b>
Hosted Meet the Professionals table at all four venues	Sponsor the afternoon masterclass session at all four locations including a welcome message and branding throughout	Company logo on delegate lanyards for all four locations	Table of 10 per location. Company logo on table of 10
<b>Coffee Cart</b> <b>\$3,000</b>	<b>Marketplace stall only</b> <b>\$3,000</b>	<b>Branded Newsletter</b> <b>\$1,000</b>	<b>Seat Drop</b> <b>\$2,000</b>
<b>AVAILABLE: 2</b>	<b>AVAILABLE: 10</b>	<b>AVAILABLE: 1</b>	<b>AVAILABLE: 5</b>
Branded coffee cart in Auckland or Wellington. (Consumables not included)	A space in the conference marketplace at all four locations for morning tea, lunch and afternoon tea with two exhibitor passes	FSC send out regular EDM newsletter updates, sponsorship of the newsletter includes logo, hyperlink and advertisement	Opportunity to provide 1500 items for all four locations to be placed on each delegate seat. Examples include: pens, pads, sweets



# 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](mailto:events@fsc.org.nz)





# 2023 & 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 2023 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 Sponsor and Marketplace Opportunities Prospectus 2023 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 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 may also be made available to the Event venue pursuant to any COVID-19 Public Health Response Order or similar health order, including any Order Amendments (Health Order) in force at the time of the Event.

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 Health Order, 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 and Health Pandemics

The Organiser and all Sponsors, delegates, and contractors of the Event are required to comply with any applicable Event venue requirements and adhere to all requirements as per the New Zealand Government's protocols in accordance with any applicable in force Health Order 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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