

Front-footed

Think ahead, act in anticipation.

8.00am Registration and Coffee

9.00am **MC: Alison Mau**

Welcome: David Biegel, Chairman, Workplace Savings NZ

9.15am **Keynote Address:** KiwiSaver – ambition fulfilled or a work in progress? Dr Michael Cullen, Former Deputy Prime Minister and Minister of Finance

9.45am **Keynote Address:** Regulators, consumers and highly uncertain times. Hanzo van Beusekom, Clear Conduct, Partner

Regulators as consumer advocate, role of regulators in smoothing the investment cycle, how much information should providers give consumers, 'good information' versus 'good information, poor timing'.

Followed by Q&A

10.30am Morning tea

11.00am **PLENARY SESSION 1**

Panel Discussion: Changing Consumer Expectations. Chaired by David Boyle, General Manager Investor Education, CFFC

Consumers enjoy more choice than ever before, and they can access services and products in new ways. More information is available than ever before, for consumers. But many of them remain concerned or uninformed – levels of understanding and interest are improving only slowly. This session will ask are we giving New Zealanders the wrong information on retirement savings, or are we still confusing them; and is KiwiSaver, a solution or a stop-gap? Why do consumers remain largely unengaged with KiwiSaver, and what would we have them do if we could get them engaged?

Speakers:

Susan Taylor, CEO, FSCL: The role of dispute resolution in raising consumer confidence and consumer awareness – feeding back lessons learned from consumer complaints.

John Kensington, Partner – Head of Financial Services, KPMG: The importance of Financial Literacy in improving consumer engagement of KiwiSaver.

Haydee Stroud, Head of Strategy, Planning & Governance, Sovereign: Information and behaviour - how much more could we do with 'nudge' techniques, do we understand the balance of compulsion and incentives?

Ralph Stewart, Managing Director, Retirement Income Group: Annuities and hybrids - how consumers understand a new idea (in New Zealand), building momentum, is regulation in New Zealand sufficiently sophisticated to adjust to new products smoothly.

Suzanne Baldwin, Financial Strategist, ImPower

Sharon Mackay, Manager Wealth & Private Bank Strategy & Product, BNZ

12.30pm Luncheon

1.30pm **PLENARY SESSION 2**

Keynote Address: Why consumers get value from regulation, even though they don't know it. Rob Everett, Chief Executive, Financial Markets Authority (FMA)

The person (consumer) who is never at the table, but can't ever be overlooked. Fiduciary duty and good conduct obligations – why they matter. Information overload and uncertainty – can you tell scheme clients too much? Governance and responsibility – should the standard for KiwiSaver governance be higher than for other schemes?

Followed by Q&A

2.00pm **PLENARY SESSION 3**

Keynote Address: Offshore lessons: Why the New Zealand savings landscape is ripe for an Uber movement. Sam Stubbs, Managing Director, Simplicity

2.30pm **PLENARY SESSION 4**

Keynote Address: Super 2020: Technology & social trends are re-shaping the global market in financial services. Darren Stevens, Director Product Management & Strategy, Bravura Solutions

How will they impact super members and providers and what do providers need to do to ensure they maintain market relevance?

3.00pm Afternoon tea

3.30pm **PLENARY SESSION 5**

Panel Discussion: Policy and Regulation over the next five years, Chaired by Elaine Campbell, Chief Counsel, AMP

Post-GFC regulation is now fully in place. Most firms and professionals have made the shift, or are partway there. What is likely over the coming five years, as the post-GFC regulation matures, and what other areas will receive regulatory attention?

Speakers:

James Hartley, Policy Manager, MBIE

Caroline Dunlop, Head of Regulatory Legal, AMP

Ross Pennington, Partner, Chapman Tripp

Elizabeth Robertson, NZ Risk & Compliance Manager, Mercer

Garth Stanish, Director of Capital Markets, FMA

5.00pm **Conference Wrap and summary:** Mike Woodbury, Partner, Chapman Tripp

5.15pm Conference close/Cocktails commence

6.15pm Cocktails conclude

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