



Take 2

IFSO Scheme Conference

Fast Forward, What's Changing?

Thursday, 1 November 2018

Four Points by Sheraton, Queen Street, Auckland

[REGISTER HERE](#)

9.15am	Registration
9.30am	Introduction Karen Stevens, Insurance & Financial Services Ombudsman
9.40am	Key note: Back to the future <i>The drivers of success, the drivers of change, and the Simplicity story</i> Sam Stubbs, Founder and Managing Director, Simplicity
10.15am	What do you know about complaints? Virginia Douglas, IFSO Scheme Business Development Manager
10.30am	Morning tea
10.45am	Innovation in advice and products (Panel) <i>Facing the future: innovation, change, social media, robo-advice, new business structures.</i> Craig Savage, Life & Health Insurance Broker, Abbott Group Sam Stubbs, Founder and Managing Director, Simplicity Michael Hewes, Manager, Supervision, Financial Markets Authority Chair: Sue Suckling, Chair, IFSO Commission



11.30am	FMA – Replacement business <i>Overview of FMA reports on QFE and adviser replacement business</i> Michael Hewes, Manager, Supervision, Financial Markets Authority
12.00	Lunch
12.45pm	Diversity: Women in Financial Services (Panel) <i>Facing the future: the importance of diversity, the role of women, individual experiences and stories.</i> Katrina Shanks, CEO Financial Advice NZ Charlotte Aronsen, National Manager Claims Practice & Customer Assurance, IAG Lyn McMorrnan, Executive Director, Financial Services Federation Inc Chair: Therese Singleton, General Manager, Advice & Sales, AMP
1.30pm	Case Study Workshops <i>IFSO Scheme case managers will lead a series of group discussions based on complaint case studies. The workshops will work through the issues in each complaint: what went wrong, how the complaint was managed, the decision made, and how issues may have been avoided. Case studies will include complaints about risk insurance, general insurance and financial advisers; and consider issues such as non-disclosure, legal responsibilities, policy interpretation and record keeping.</i>
2.45pm	Afternoon tea
3.15pm	Complaints and the Customer Journey <i>This interactive session will discuss complaints as part of the connected customer experience, turning issues into opportunities, and the value of feedback in improving your business.</i> Virginia Douglas, IFSO Scheme Business Development Manager
4.15pm	Conference Wrap-up
4.30pm	Conference close

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IFSO Scheme Conference Speakers



Sam Stubbs, Simplicity

Sam Stubbs was most recently CEO of Tower Investments, a KiwiSaver default provider. Before that he was Managing Director of Hanover Group, and spent 10 years working for Goldman Sachs in London and Hong Kong.

He previously worked for NatWest Markets, Fay Richwhite and IBM NZ. He has been a Board Member of the Financial Services Council, and a member of the Government Taskforce on Financial Services.



Michael Hewes, FMA

Prior to joining the FMA, two years ago, Michael spent 20 years in the life insurance industry [locally and throughout Asia] working across a wide range of roles including Distribution and Marketing. Michael is currently Manager, Supervision at the FMA. He leads a team responsible for monitoring FMCA licence holders; is work stream lead for Monitoring and Enforcement [FSLAB], has worked on the Digital Advice Exemption Program, and is also contributing to the Insurance Conduct and Culture review currently underway.



Katrina Shanks, Financial Advice NZ

A Chartered Accountant by trade, Katrina has spent much of her career in financial services. As a National MP for two terms, Katrina has a strong understanding of policy and legislation.

As CEO of the Funeral Directors Association, Katrina created unprecedented public awareness, and advocacy: developing a Learning Academy, Leaders of Tomorrow programme, and overseeing the significant Funeral Trust.

Katrina is excited about the opportunities ahead to make a real difference as CEO of Financial Advice NZ.



Lyn McMorran, Financial Services Federation

Financial Services Federation (FSF) is the industry body representing responsible and ethical finance and leasing companies in New Zealand. Lyn was Area Manager for Westpac's Private Bank in the Lower North and South Islands running a team of Private Advisers and support staff.

She has been a financial services professional for over 20 years, and has a particular interest in ensuring that all New Zealanders have access to appropriate financial advice and finance products provided responsibly.

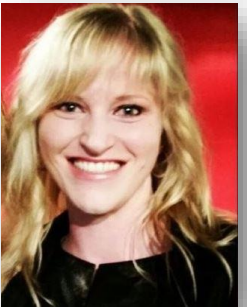
Lyn is also a Trustee of the Skylight Trust, a Commissioner for the IFSO Scheme, a member of the Investment Sub-Committee of the National Council of Women, and a member of the Australasian Society of Association Executives Board. Lyn also sits on the MBIE Responsible Lending Code Advisory Committee.



Craig Savage, Life and Health Insurance Broker, Abbot Group

"Hi, my name is Craig Savage, I am 26 years old and have lived in Christchurch my whole life. I graduated from the University of Canterbury in 2015 with a Commerce degree, majoring in accounting & finance.

Prior to commencing my insurance career I raced as a professional triathlete across the world and won numerous South Island and National events. I chose a life insurance career because I love meeting new people, building relationships and providing valuable advice to people all across NZ. I work for the Abbott Group which specialises in all forms of risk management from life & health, domestic and F&G insurances"



Charlotte Aronsen, National Manager Claims Practice & Customer Assurance, IAG

Charlotte has over 12 years' experience in the insurance industry.

In 2010 she moved into IAG's earthquake team, starting in technical claims and moving into leadership roles, most recently as the Operations Manager for Kaikoura.

Charlotte currently leads a team of 7, who are managing complex complaint resolutions.

She is also responsible for driving a number of collaborative initiatives for continuous improvement across IAG.