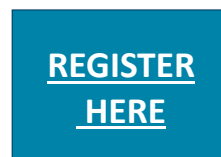




IFSO Scheme Conference 2019

Supporting change, Sharing solutions

8 – 9 May, Four Points by Sheraton, Auckland



Forum: Responding to consumer vulnerabilities, 8 May 2019

12.00	Registration and light lunch
12.15pm	<i>Responding to Consumer Vulnerabilities</i> Michael Hewes, Manager Supervision, FMA Virginia Douglas, Business Development Manager, IFSO Scheme
12.45pm	<i>Mental health – how it affects people; how to recognise and respond appropriately</i> Dr Grant Lester, Consultant Forensic Psychiatrist, Victorian Institute of Forensic Mental Health
2.15pm	<i>Identifying and effectively responding to consumer vulnerabilities</i> Soraiya Daud, Communications Adviser, FinCap Hanny Naus, Professional Educator, Age Concern
2.45pm	Afternoon tea
3.00pm	<i>Strategies to manage anger, threats and other behaviours</i> Dr Grant Lester
4.30pm	<i>Identifying and effectively responding to consumer vulnerabilities</i> Pete Davis, National Business Development Manager, Literacy Aoteroa Alistair Burry, Acting CEO, Cancer Society Michelle Gundersen-Reid, Manager Supportive Care, Cancer Society
5.00pm	Drinks and refreshments

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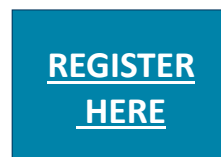




IFSO Scheme Conference 2019

Supporting change, Sharing solutions

8 – 9 May, Four Points by Sheraton, Auckland



Conference: Supporting Change, Sharing Solutions, 9 May 2019

9.00am	Registration
9.30am	<i>Introduction</i> Karen Stevens, Insurance & Financial Services Ombudsman
9.40am	<i>Where to from here? FMA-RBNZ report on life insurer conduct and culture</i> Liam Mason, Director of Regulation, FMA
10.25am	Morning Tea
10.50am	<i>Introduction</i> Sue Suckling, IFSO Scheme Commission Chair
11.00am	<i>What does consumer-driven really mean?</i> Tim Barnett, CEO, FinCap
11.45am	<i>Panel Discussion: The future of financial adviser businesses</i> Chair: Katrina Shanks, CEO, Financial Advice NZ Panellists: Camilla Gribble, IKONIK Tim Fairbrother, Rival Wealth Ramesh Naran, Kiwiwealth
12.30pm	Lunch
1.30pm	<i>Consumer vulnerabilities – sharing solutions, creating change</i> Virginia Douglas, Business Development Manager, IFSO Scheme
2pm	<i>Insurance law update</i> Peter Leman, Partner, DLA Piper
2.30pm	<i>Complaint case study workshops</i> IFSO Scheme case managers
3.15pm	Afternoon tea
3.30pm	<i>Complaint case study workshops (continued)</i>
4.15pm	<i>Conference wrap up</i> Karen Stevens, IFSO
4.30pm	Conference close

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IFSO Scheme conference speakers



Dr Grant Lester, Consultant Forensic Psychiatrist

Dr Lester is a consultant forensic psychiatrist whose public practice is with the Victorian Institute of Forensic Mental Health and as a Member of Victoria's Mental Health Tribunal.

Dr Lester's research interest has been into querulant and vexatious complainants and litigants and latterly in the management of complex clients and complaint. He presents training for staff of government, courts and private organisations in managing complex clients, and unreasonable complainant or litigant behaviours.



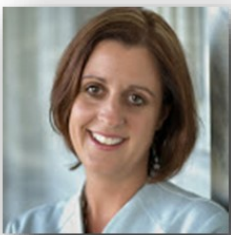
Liam Mason, Director of Regulation, Financial Markets Authority (FMA)

Liam leads and oversees the licensing and supervision of all financial market participants, from individual AFAs through to KiwiSaver providers. He is also responsible for the FMA's compliance frameworks, contacts and intelligence functions.



Tim Barnett, CEO, FinCap

Tim Barnett has been CEO of FinCap since its inception in June 2017. He has had a career in NGO management and politics, including as a local body councillor in London; an MP for the NZ Labour Party, an NGO Chief Executive (including New Charlton Community Association, Greenwich Volunteer Bureau, National Association of Volunteer Bureaux then the Stonewall Lobby Group, and Christchurch Community Law Centre), an NGO senior manager (World AIDS Campaign, Tūhoe); NZ Labour Party General Secretary; and a consultant in South Africa .



Katrina Shanks, CEO, Financial Advice NZ

A Chartered Accountant by trade, Katrina has spent much of her career in financial services. As a former MP, 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 making a real difference as CEO of Financial Advice NZ.



Camilla Gribble, Director, IKONIK

Camilla, the founder of IKONIK is passionate about the lifetime value of education and financial literacy. By empowering everyday Kiwis with the confidence to take control of their financial futures, IKONIK is fast becoming a household name.

Camilla's inspiring life journey, and numerous industry achievements, have made her a role model for young entrepreneurs and women in business.



Ramesh Naran, Digital Strategy Lead, KiwiWealth

Ramesh's experience in the wealth management industry includes 10 years in Sydney at BT Financial Group and ANZ Wealth in Digital Product Development roles. Ramesh returned home to Wellington in 2013 to become Senior Product Manager at Gareth Morgan Investments, now Kiwi Wealth. He became the lead for Kiwi Wealth's digital team, and delivered the award-winning digital retirement planning tool 'Future You'. In his current role as Digital Strategy Lead, Ramesh is exploring the latest digital technologies to educate and empower investors and advisers.



Tim Fairbrother, Director, RIVAL Wealth

Tim has been a financial adviser in New Zealand since 2008, setting up Wairarapa based financial planning business RIVAL Wealth which has seen consistent growth. Tim was previously Business Development Manager at TOWER, and Head of Business Development for Ireland's Oppenheim Investment Managers, significantly increasing new investments. RIVAL Wealth was very proud to win the prestigious Diversity Award in 2018 for the best business in the country for work-life balance. This was back up with Tim being awarded the 'Excellence in Advice Award'.



Peter Leman, Partner, DLA Piper

Peter is a partner in the Insurance team at DLA Piper, and leads the team in Wellington. He has been specialising in this area for more than 30 years and has a deep interest in all aspects of insurance law.