

# Adviser Speak



## 2023 Conference Agenda

COPTHORNE HOTEL AND RESORT  
QUEENSTOWN LAKEFRONT

**Wed 23rd – Fri 25th**  
**August 2023**

<p>WED 23</p>	<p>19:00</p>	<p>Dinner <i>Botswana Butchery - 17 Marine Parade, Queenstown</i></p>
<p>THU 24</p>	<p>08:00</p>	<p>Conference start at 8.15am – Welcome and House Keeping <i>SIFA Chair</i></p>
	<p>08:30</p>	<p>The Currency of Trust <i>Dr. Louise Mahler, Leadership influencer and executive mentor</i></p> <p>The Ancient Romans told us 'delivery' is 80% of communication, but in our modern world these skills have been lost. It is time to re-consider how you walk, talk and move, because these are the skills that build and hold trust with your clients. In this session we will cover the whole gamut of making an entrance and greeting clients, through working on delivering the package and even handling the difficult questions that arise. You will learn about eyes, gestures and how you listen. You will learn the magician's trick of guiding the eyes of others and know what to do for the voice of trust. There are tips and tricks at every stage that could make a huge difference to your working life.</p>
	<p>10:00</p>	<p>Morning tea</p>
	<p>10:30</p>	<p>Cyber security trends, risks and how to gain confidence <i>Hamish Beaton, GM Cyber Security Advisory, Kordia</i></p> <p>Cyber attacks, security incidents and data breaches have had increasing impacts on businesses over recent years. This subject can often feel like the sole domain of the technology expert, and difficult to get a layman's understanding on the real risks and mitigations available. Hamish will discuss some of the trends and developments in the cyber security world over the past decade, and the current challenges facing businesses in protecting their IT systems and data. He will also provide some advice and guidance on practical steps you can take to be more confident in your approach to cyber security.</p>
	<p>11:15</p>	<p>The Science of Spending <i>Ben Brinkerhoff, Head of Advice, Consilium</i></p> <p>Understanding the psychological processes in the act of spending money and learning how you can help your clients to grow life and happiness with wealth.</p>
	<p>12:45</p>	<p>Lunch</p>
	<p>13:30</p>	<p>Platinum sponsor session – Platinum Asset Management <i>Julian McCormack, Investment Analyst, Platinum Asset Management</i></p>
	<p>14:00</p>	<p>Do you know what it really costs to provide advice and ongoing service to your clients? <i>Marisa Broome, Wealthadvice Principal &amp; Certified Financial Planner®</i></p> <p>Marisa will provide us with insight into an alternative financial planning pricing model. Setting a pricing structure for financial planning services also requires identifying clients who want a specific service to ensure a proper fit for your business. Those with a high perceived value, or those who require more time at an affordable cost, that the business can deliver profitably.</p>
	<p>15:00</p>	<p>Platinum sponsor session – BetaShares Exchange Traded Funds <i>David Bassenese, Chief Economist at BetaShares Exchange Traded Funds</i></p>
	<p>15:30</p>	<p>Afternoon tea – Bar open 15:30 – 17:30</p>
	<p>16:00</p>	<p>Panel Discussion – UK &amp; US migrants, a tax minefield <i>Chaired by Charlene Overell with guests Chris Heffernan and James Howard</i></p>
	<p>17:00</p>	<p>Close of Day 1</p>
	<p>19:00</p>	<p>Dinner <i>White &amp; Wongs - 59 Beach Street, Queenstown</i></p>

FRI

25



**8:00** Leading winning teams  
*Dan Gilbert, CEO, Gull NZ*  
In the ever-changing world of business, what are the key traits required to lead a winning team.

**8:45** Masterclass in client interaction  
*Dr. Louise Mahler, Leadership influencer and executive mentor*  
How do we put it all into practice? Well, it's time to get fresh eyes on the whole process. In our masterclass session, Louise will help you roll these skills into your customer experience, at every stage of the engagement from beginning to end with a fine-tooth comb. You will consider what you do from a new perspective and have fresh eyes to go away to reengage with your clients.

**10:15** Morning tea

**10:45** The FMA's change of direction – what does that mean for us?  
*Michael Hewes - Director of Deposit Taking, Insurance and Advice, FMA*  
In January 2023, the FMA announced a change of direction to an outcomes-based approach. An outcomes-focused approach does not start at what the legislation says, or what a rule book says, it starts with what is the right outcome for a strong sector that works well for all. This approach ensures regulations and rules are a means to an end, rather than an end in themselves. The real end is fair outcomes. Michael will discuss what this means for the financial services industry.

**11:30** Platinum sponsor session – PMG Funds  
*Rory Diver, Investor Relationships Manager*

**12:00** ESG: do's and don't's  
*Fraser Whineray, COO at Fonterra*  
Is ESG philanthropy something that is supposed to be tightly linked to company value, or somewhere in between? What forms of capital are providing the most pressure on firms sustainable activities, and are companies responding effectively? Fraser will explore the intersection of real value vs green (and other forms) of washing.



**13:00** Lunch on the run

**13:30** Toxic professionalism, the way we've always done it isn't helping anyone.  
*Shelly Davies, International speaker and writing coach*  
What if most of what you've learned about "professional writing" was a lie? What if those years studying and those bosses and those templates literally embedded poor writing practices in your unsuspecting brain? Let's challenge everything. Because the brains of modern readers do not work like the brains of readers 20 or 30 years ago, but so much of what we think we know about writing is simply that outdated. Shelly will both entertain and challenge us as she guides us through:

- What does "professional" even mean?
- The modern reader and the Tinder filter
- Plain language - what it is and what it isn't
- The neuroscience of reading
- How great written communication is MUCH easier than we think

**15:00** Conference end & Chairman's closing address  
*SIFA Chair*

## Introducing our keynote speakers

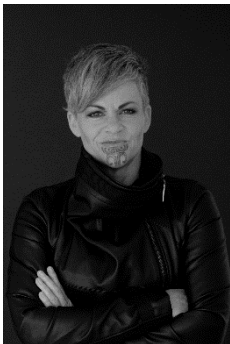


### Dr Louise Mahler

A rare breed as one of the world's leading keynote speakers, Dr. Louise Mahler has been voted in the top experts in both Body Language and Communication globally. Highly qualified with multiple degrees and masters, Louise has a PhD in Business, focusing on Leadership Communication, and in 2023 was awarded the title of Adjunct Professor

Obsessed with creating exceptional human connection, Louise helps leaders and teams to elevate their body language, voice and divulges the algorithms of engagement in high- stakes engagement. While her tools and techniques are useful, practical and highly relevant, she is best known on-stage and in the media for her in-the- moment, deeply insightful analysis and hilarious impersonations of world leaders. Her skills in translating and articulating how leaders communicate creates a powerful world-class, incredibly engaging and interactive experience that delegates often say is "life-changing".

Louise makes regular appearances on highly ranked prime-time TV. Quoted in USA and British media, she is a weekly contributor to digital and print news throughout Australia. She recorded 36 videos for the Australian Financial Review and was chosen by IBM as a key creative source worldwide. She is the host of her own podcast POP: Perspectives on Performance featuring stories, tools and techniques of all performing arts and their applicability to leadership.



### Shelly Davies

Shelly Davies has been described as the love child of Brené Brown and P!nk although her very awesome parents would probably disagree. She's of New Zealand Māori descent, a fact that is literally etched onto her chin and she's known internationally for her unconventional and irresistible work in the field of plain language and clear communications.

At age thirty-seven, Shelly walked away from her family's five-generation commitment to a conservative Christian religion and started the exploratory period of her life, also known as "fucking shit up." She drank alcohol and coffee for the first time, started showing some skin to the daylight, and dedicated herself to fluency in a whole new language: profanity.

She now uses her hard-won lessons in badassery to inspire audiences around the globe to know themselves, love themselves, find power, and have joy. Shelly lives in Rotorua, with her Carver Boy, unless she's at home on Aotea, Great Barrier Island, not wearing pants.

Shelly is of Ngātiwai, Ngāpuhi, and Ngāti Porou descent, and is conversational in te Reo Māori.

### Michael Hewes

Michael is responsible for the effective oversight of deposit takers, insurance companies and financial advisers at the FMA. Has been with the FMA for seven years, most recently as Head of Financial Advice and previously Manager, Supervision. He has deep financial services industry experience, having previously held senior roles at insurers AIA and Sovereign.

Michael has a Post Graduate Diploma in Commerce from Lincoln University and a Bachelor of Arts from the University of Canterbury.





### Marisa Broome

Marisa is the managing principal at Wealth Advice based in Sydney. She has worked in financial services for more than 35 years, initially in funds management and for over 26 years as a financial planner. Marisa believes that everything she does every day with her clients should make a difference in their lives. Her approach to financial planning is all about getting the strategy right and from that the client's goals are met.

Marisa is a CERTIFIED FINANCIAL PLANNER® and the ex-Chair of the Financial Planning Association of Australia (FPA), Marisa is a member of the Advisory Board for the Conexus Institute, a director of the Rebecca L Cooper Medical Research Foundation and a member of the Professional Standards Committee of the Financial Planning Standards Board.



### Dan Gilbert

Dan has over 25 years FMCG domestic and international business experience, having worked for the iconic branded businesses of Mars, Lion, Heineken and most recently The Griffin's Food Company.

For the past 15 years Dan has been on Executive Leadership Teams with his most recent roles being Managing Director of Heineken in the South Pacific, Griffins NZ and is currently CEO of Gull NZ, the third largest fuel retailer in New Zealand. Dan is a keen sportsman, holds a Bachelor of Commerce and Administration from Victoria University of Wellington and is a graduate of INSEAD Business School France.



### Fraser Whineray

Fraser is currently the Chief Operating Officer of the Fonterra Co-operative, responsible for its New Zealand manufacturing site and global supply chain operations, sustainability, technical, IT and safety, quality and regulatory functions. From August 2023, Fraser will be pursuing opportunities in the VC/PE space, and he has also recently been appointed as an Independent Director to the Climate Centre for Action JV, a public: private partnership to solve ruminant methane emissions in pastoral farming.

Fraser's previous roles include Chief Executive of Mercury, Non-executive directorships of Tilt Renewables and Opus and Chair of the Prime Minister's Business Advisory Council. In 2019 he was named the Deloitte Top 200 Chief Executive of the year. Fraser holds an MBA from the University of Cambridge, a Bachelor of Chemical Engineering from Canterbury University and a Diploma in Dairy Science and Technology from Massey University.



### Hamish Beaton

Hamish leads Cyber Security Advisory and Incident Response practices for the Kordia Group. As General Manager of Cyber Security Advisory, Hamish is responsible Kordia's Cyber Advisory and Incident Response practices, ensuring Kordia is well placed to deliver outstanding cyber security consulting services for those looking to secure their organisations. Prior to joining Kordia, Hamish served as the Director of Cyber Security within the National Cyber Security Centre (NCSC) and had worked across various roles within the New Zealand intelligence community.

When working at the NCSC, Hamish led teams responsible for delivering cyber threat detection and disruption services, as well as advisory and incident response support, to New Zealand's most nationally significant organisations, and has supported the government's response to major cyber security threats. Hamish has a background in foreign languages, graduating from Canterbury University with a bachelor's degree majoring in Japanese and French, and spent several formative years living and working in Japan.



### **Ben Brinkerhoff**

As Head of Adviser Services for Consilium, Ben works with over 120 independent financial advice firms across New Zealand and Australia, helping to grow and develop their ideal advice practice. Ben has worked with Consilium since its inception in 2012, which now holds over \$6.5 billion in funds under administration.

Ben has over 15 years' experience in financial services including Chief Operations Officer of Index Funds Advisers in the United States and in various economic consulting roles in the US and abroad. Ben is a frequent author writing many articles and whitepapers, and recently published his first book, A Little Book of Financial Wisdom — Clarity in the midst of a financial crisis, a collection of articles written in the midst of the COVID-19 crisis. Ben has a BA in History and Economics from the University of California.

### **Chris Heffernan**



A UK Chartered Tax Adviser, Chris is one of the country's leading taxation experts in this niche area, with a long connection to the financial services profession, taxation, and UK pension transfers.

A UK Chartered Tax Adviser, Chris is the CEO iSelect Superannuation and Taxation and one of the country's leading taxation experts in this niche area, with a long connection to the financial services profession, taxation, and UK pension transfers.

### **James Howard**

Executive Director, Head of Growth & Advisor, Financial Adviser Cambridge Partners



A Canterbury local James has worked overseas for EY and has specialist expertise in dealing with international migrants and those wanting to invest in New Zealand. James has a BCom from the University of Canterbury majoring in accounting, finance, management and information systems. He is a member of the Institute of Chartered Accountants.

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