

8-9 MAY 2024

SHIFTING
THE DIAL

DAY 1

Wednesday 8 May 2024

8.00am – 8.45am

Networking and coffee

8.45am – 9.00am

Mihi Whakatau:

Ngāti Whātua Ōrākei

9.00am – 9.15am

Welcome and introduction:

MC Michele A'Court

Jane Wrightson - *Retirement Commissioner*

9.15am – 9.45am

Political keynote:

Government priorities for supporting better financial wellbeing outcomes

Hon Andrew Bayly

- *Minister of Commerce and Consumer Affairs*

9.45am – 10.30am

Spotlight:

Rise Up with the Morning Shift – how NZ's biggest podcast is breaking down barriers to help New Zealanders' financial futures

Jordan River, Brook Ruscoe, Marc' Peard

10.30am – 11.00am

Morning tea break

11.00am – 11.30am

Spotlight:

How open banking will change the game

Jane-Renee Retimana - *Payments NZ*

11.30am – 12.15pm

Panel discussion:

Nudging for good – how banks are influencing better outcomes

Chair: Nicola Sladden - *Banking Ombudsman*

Angeline Pearson - *ANZ*

Rosalyn Clarke - *ASB*

Martin King - *BNZ*

Rebecca Lee - *Kiwibank*

Mark Street - *Westpac NZ*

12.15pm – 12.30pm

Spotlight:

Journey to Māori Financial Wellbeing - Te Rito Hou programme and what we learned

Tawa Campbell-Seymour - *ASB*

Miles Erwin - *New Zealand Banking Association*

12.30pm – 1.30pm

Lunch break

1.30pm – 2.00pm

Spotlight:

Working together to empower whānau

Lisa Davis - *Ngāti Whātua Ōrākei*

2.00pm – 2.40pm

Panel discussion:

What's happening in the community?

Chair: Michele A'Court

Tania Huata-Kupa - *Ngāti Pāhauwera Development Trust*

Shirley McCombe - *Bay Financial Mentors*

Jeanette Parsons - *Moneywise Manawatu*

2.40pm – 3.00pm

Spotlight:

Planning for what comes next in the National Strategy

Rachel Beckett

- *Te Ara Ahunga Ora Retirement Commission*

3.05pm

Workshop reminders:

MC Michele A'Court

3.05pm – 3.35pm

Afternoon tea break

3.35pm – 4.45pm

Facilitated breakout sessions:

Setting the action plan for the new National Strategy

Co-design workshop: *Developing the new National Strategy 2024 - 2027*

4.45pm – 4.50pm

Wrap up:

Jane Wrightson - *Retirement Commissioner*

4.50pm – 6.30pm

Canapes and drinks/networking



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DAY 2

Thursday 9 May 2024

7.30am - 8.00am **Networking and coffee**

8.00am - 9.20am **Optional breakfast workshops:**

Shifting the dial for Māori
Shifting the dial for women
Shifting the dial for Pacific Peoples

9.20am - 9.30am **Break before main session**

9.30am - 9.40am **Welcome back:**
MC Michele A'Court

9.40am - 10.00am **Spotlight:**
Science-based tools to rewire money beliefs, goals
and habits
Vishal George - Behavioural by Design

10.00am - 10.20am **Spotlight:**
New approaches to building resilient communities
Alice Mose-Tuialii and Fala Tavita
- Piri'anga Alofa Pacific Community Services

10.20am - 11.00am **Panel discussion:**
Designing for a better future — innovative approaches to
financial resilience
Chair: Susan Taylor - Financial Ombudsman
Kris Faafoi - Insurance Council of New Zealand
Emma Saunders - Good Shepherd
Lyn McMorran - Financial Services Federation

11.00am - 11.30am **Morning tea break**

11.30am - 12.00pm **Keynote:**
Financial education and the future
Frances Valintine - Academy Ex, Mindlab, Tech Futures Lab

12.00pm - 12.40pm **Panel discussion:**
Growing financial knowledge for all ages
Chair: Warren Ngan Woo - Westpac
Erin Thompson - Te Ara Ahunga Ora Retirement Commission
Kendall Flutey - Banqer
Latayvia Tualasea Tautai - YWCA

12.40pm - 1.00pm **Concluding remarks:**
Jane Wrightson - Retirement Commissioner

