

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 - 9.05am

**Welcome and introduction:**

MC Michele A'Court

9.05am - 9.30am

**Political keynote:**

Government priorities for supporting better financial wellbeing outcomes

Hon Andrew Bayly

- *Minister of Commerce and Consumer Affairs*

9.30am - 9.45am

**Introduction:**

Jane Wrightson - *Retirement Commissioner*

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  
Fala Tavita - *Le Fale*

**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 Valentine - *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*

