

## **Fidelity Life – Adviser council.**

### **Candidate requirements briefing paper 2026.**

*#1: Digital, technology and productivity.*

#### **Purpose of the Adviser council.**

The Fidelity Life Adviser council is a non-binding advisory committee providing independent opinion, advice and insights related to strategic plans, adviser and customer experience, and emerging industry trends.

#### **Council structure & membership requirements.**

- Adviser members are appointed for a minimum of 2-years.
- Members participate in quarterly meetings in Auckland.
- Members maintain confidentiality of all information shared.
- Fidelity Life covers reasonable travel requirements.

#### **Profile of essential skills & attributes.**

*A. Strong adviser practice expertise.*

- Clear understanding of customer base and advice business model.
- Experience engaging with diverse customer needs.

*B. Thoughtful contribution to industry issues.*

- Alignment with council objectives such as connect with the customer, influence for good, and strength to strength.
- Customer-focused thinking and practical insight.

*C. Experience in advisory or leadership roles.*

- Experience in committees, associations, peer groups, or advisory boards.

*D. Alignment to Fidelity Life's conduct expectations.*

- Upholds the Fair Conduct Programme and Good Customer Outcomes Principles of Trust, Value and Clarity.
- Strong conduct history.

*E. Personal qualities.*

- Diversity of thought, business type, tenure, gender, location, personality and contribution to council culture.

## **Additional capabilities desired for this vacancy.**

### *A. Digital evolution & operating model modernisation.*

- Experience adopting or championing digital tools and platforms.
- Track record of improving customer experience, compliance, or efficiency through digital solutions.
- Ability to interpret emerging digital trends and their practical implications.

### *B. Workforce productivity & business efficiency.*

- Experience with workflow automation, data-driven decision-making, scalable service models, and productivity tools.

### *C. Navigating a dynamic technology sector.*

- Ability to evaluate the implications of AI, analytics, customer onboarding, and adviser tools.
- Understanding how technology reshapes risk advice, distribution, customer expectations and regulatory requirements.

## **Expected contributions.**

- Offer structured feedback on technology roadmap and initiatives (customer-facing and adviser-facing).
- Surface emerging risks or inefficiencies impacting productivity.
- Act as a sounding board for digital engagement strategies and adviser enablement.
- Provide insight into digital experience and adoption.

## **Summary of an ideal candidate profile.**

- Operates a forward-thinking, tech-enabled adviser practice.
- Demonstrates leadership in digital transformation or innovation.
- Understands workforce design, service models, and productivity.
- Customer-centred thinker committed to our adviser community.
- Collaborative, constructive, and aligned with Fidelity Life values.