

Fidelity Life – Adviser council.

Candidate requirements briefing paper 2026.

#2: Growth and commercial leadership.

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. Building scalable business models:

- Demonstrates experience growing an adviser practice or business unit through scalable systems, processes and operating models.
- Proven ability to identify inefficiencies and implement improvements that enable sustainable scale without compromising customer outcomes.
- Familiarity with designing service models, customer journeys or operational frameworks that support growth at pace.

B. Creating and accelerating growth opportunities:

- Track record of unlocking new revenue streams or expanding into new customer segments.
- Ability to interpret market shifts and translate them into commercial opportunities for advisers and customers.
- Experience shaping growth strategies that balance innovation, risk, compliance and practicality for everyday adviser use.

C. Developing new revenue / business lines:

- Experience conceptualising, testing and launching new products, propositions, or end-to-end business lines.
- Ability to bring a structured, market-led view to opportunity sizing, customer value articulation, and commercial viability /business casing.

D. Strategic commercial insight.

- Experience and ability to evaluate emerging commercial models across the insurance, financial services, and adjacent sectors.
- Strong understanding of how market dynamics, regulatory change, and adviser needs influence long-term growth strategy.
- Confident interpreting commercial data, financial drivers and competitive insights to guide decision-making.
- Understanding of partnership success factors including governance, value-sharing models, risk allocation, and cultural alignment.
- Ability to assess when partnership, alliance or JV structures are the right mechanisms for achieving scale or speed to market.

Expected contributions.

- Credibly contribute to dialogue focused on where Fidelity Life can support advisers to scale sustainably.
- Act as a sounding board for growth initiatives, partnership concepts, and new business model exploration.

- Surface opportunities and risks related to expansion into new segments, propositions, or collaborative ventures.
- Offer practical feedback on commercial ideas, value propositions, and operational readiness for growth.

Summary of ideal candidate profile.

- Operates a forward-thinking, growth-oriented adviser practice with experience scaling sustainably.
- Demonstrated commercial leadership in expanding into new business lines or markets.
- Brings practical insight into partnership, alliance and joint-venture opportunities that support adviser and customer value.
- Strong strategic judgement and the ability to interpret market dynamics into actionable growth pathways.
- Customer-centred, collaborative, constructive and committed to supporting Fidelity Life's future growth and adviser community.