

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

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

#### *#3: Diversity, community and cultural insight.*

#### **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. Deep understanding of New Zealand's diverse communities.*

- Demonstrated experience working with or advising customers across New Zealand's multicultural communities, including Māori, Pacific peoples, Asian communities, ethnic minorities and migrant populations.
- Ability to recognise cultural nuances in financial behaviours, protection needs and family decision-making structures.
- Practical affinity with community groups, networks, or initiatives that support diverse populations.

### *B. Commitment to diversity, equity and inclusion.*

- Experience championing inclusion within adviser practices, customer engagement models or industry groups.
- Track record of creating equitable experiences for customers of different genders, ethnicities, ages, abilities, socio-economic backgrounds and identities.
- Ability to identify barriers to access and advocate for solutions that close gaps in advice, support and outcomes.

### *C. Designing advice and solutions for multi-cultural needs.*

- Understanding how cultural values influence life insurance needs, product suitability, risk perceptions, and financial decision-making.
- Experience tailoring advice, communication and service models to meet diverse linguistic, cultural or demographic contexts.
- Ability to provide grounded insight into emerging needs within growing cultural communities across New Zealand.

### *D. Building trust and engagement across communities.*

- Proven ability to build strong, trust-based relationships with customers and advisers across different cultural, ethnic, and demographic groups.
- Knowledge of culturally appropriate engagement practices, including whanaungatanga (relationship-building), talanoa (open dialogue), and community-first approaches.
- Experience collaborating with community leaders, organisations or networks to improve access to advice.

## **Expected contributions.**

- Provide insight into how Fidelity Life can better meet the needs of New Zealand's increasingly diverse population.
- Surface opportunities to strengthen relevant advice, communication and product development for diverse communities.

- Act as a sounding board for DEI (Diversity, Equity and Inclusion)-driven initiatives, customer research and adviser enablement strategies.
- Highlight emerging demographic trends and community needs that influence future life insurance solutions.

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

- Operates an inclusive, community-connected adviser practice with experience supporting New Zealand's diverse populations.
- Demonstrates leadership in serving customers across different cultural, ethnic, gender and demographic groups.
- Brings practical understanding of Māori, Pacific, Asian and migrant community needs in life insurance advice and solutions.
- Strong ability to translate community insights into equitable, accessible customer experiences.
- Collaborative, respectful and committed to strengthening Fidelity Life's responsiveness to New Zealand's diverse and multicultural landscape.