

ANNUAL REPORT 2026

The Institute of Finance Professionals NZ Inc. (INFINZ) is the leading association for professionals in New Zealand's finance ecosystem



GROWING THE CAPABILITY OF OUR MEMBERS AND THE FINANCE ECOSYSTEM FOR THE BENEFIT OF THE WIDER ECONOMY

Chair & Executive Director's Report

80%

Rated the
MEMBER VALUE RECEIVED AT
7/10 OR BETTER
(65% in 2019)

ON 30 SEPTEMBER 2026:

2031

TOTAL MEMBERSHIP

(UP 14% OVER THE PAST 7 YEARS)

LINKEDIN ENGAGEMENT

9.4%

INCREASE SINCE Q1

58%

of the total
membership
is under 40

39%

of the total
membership is
female

(29% at 30 September 2019)



447

REGISTERED FOR THE 2025
INFINZ CONFERENCE
(429 for the 2019 conference)

750

attended the sold-out
May 2026 INFINZ
Awards Dinner

RELEVANCE THROUGH GROWING SECTOR CAPABILITY AND FOCUSING ON ISSUES THAT MATTER



Our mission is to empower a more prosperous, inclusive and sustainable New Zealand, by improving the capability and effectiveness of the finance ecosystem and the members within it.



Will Goodwin,
Chair INFINZ

INFINZ's mission is to empower a more prosperous, inclusive & sustainable New Zealand, by improving the capability and effectiveness of the financial sector ecosystem and the members within it.

The three strategic pillars applying through 2025/26 included:

- Member capability building,
- Ecosystem strengthening, and
- INFINZ organisational resilience.

GROWING THE CAPABILITY OF OUR MEMBERS AND THE INDUSTRY

The objective of this strategic pillar is to build an engaged, growing and increasingly diverse membership, with access to career-enhancing skills, professional development and opportunities that support career progression across the financial services industry.

During 2025/26, INFINZ continued to advance this objective through initiatives focused on diversity and inclusion, professional education, leadership development and mentoring. Following public consultation in 2024 on a major INFINZ-commissioned report examining opportunities to strengthen engagement with Māori and increase the representation of women in senior leadership roles, INFINZ introduced a revised parental leave policy for members in 2025. The policy focuses on maintaining professional connections during periods of parental leave, recognising the importance of continued industry engagement and supporting a successful transition back into the financial services workforce.

Professional development remained a key priority, with INFINZ continuing to offer its established Next Directors, CFO Fundamentals, and Strategy and Value Creation courses. These programmes have been well received and are designed to equip experienced professionals and subject matter experts with the broader skills, knowledge and perspectives required to progress into senior leadership and governance roles. The education programme was further expanded in 2026 to reflect changing industry needs and emerging areas of professional development. A new AI Fundamentals course was introduced to complement INFINZ's existing Python training, providing members with opportunities to develop their understanding of technologies increasingly relevant to the finance profession. A new Transformational Leadership course was also introduced, broadening the professional development offering for members seeking to strengthen their leadership capabilities.

INFINZ's mentoring programme continued to provide valuable opportunities for professional guidance, knowledge sharing and career development. The programme maintained strong participation, with 44 mentoring pairs operating in 2026, compared with 41 in 2025. This reflects the ongoing commitment of members who volunteer their time and experience to support the professional development of others.

Together, these initiatives demonstrate INFINZ's continued focus on strengthening the capability of its

membership, supporting career progression and fostering a more connected, skilled and diverse finance profession.

FINANCE ECOSYSTEM STRENGTHENING

The objective of this strategic pillar is to contribute to meaningful change and improvements in the operation of New Zealand's finance ecosystem, through industry engagement, professional development, collaboration and recognition of excellence.

During 2025/26, INFINZ continued to advance this objective through a broad programme of initiatives designed to strengthen industry capability, encourage participation and support the next generation of finance professionals. The annual INFINZ Awards programme remained a cornerstone of this activity, recognising and celebrating excellence across 14 categories. Winning entries received wider recognition through profiles published in the New Zealand Herald and subsequent INNEWS articles, showcasing achievements, innovation and professional excellence across the finance sector.

Alongside the Awards Dinner, annual Conference and learning and development programmes, INFINZ delivered 47 member events nationally, compared with 42 in 2025. Of these, 23 events focused on career development for younger professionals (2025: 18), while 24 addressed topics of current interest across the finance sector (2025: 24), including artificial intelligence,



Tracey Walker
Retiring Board Member



Stephan Deschamps
Retiring Board Member



John Vanderbom
Retiring Board Member

financial market developments and regulatory change. These events aimed to provide participants with practical insights and knowledge they could apply in their professional roles. Supporting access to education and career opportunities remained an important priority. INFINZ continued its partnership with First Foundation, which assists students who might otherwise face financial barriers to tertiary education. INFINZ directly supported two scholars, consistent with 2025, while encouraging members and sponsors to participate. First Foundation alumni also shared their experiences at the annual Awards Dinner. In 2026, INFINZ introduced a silent fundraising initiative at the Dinner, generating sufficient contributions to fund two additional scholarships. INFINZ also maintained an active student engagement programme, offering nominal membership fees, scholarships to attend the annual Conference, and presentations to tertiary classes and student clubs highlighting career opportunities across the broader financial services industry. As the major sponsor of AUT's Shadow a Leader programme, INFINZ continued to support connections between emerging talent and business leaders. The programme brought together 107 teams of secondary school students, tertiary students and business leaders in 2026, compared with 119 in 2025. Collaboration with other industry organisations remained a key feature of INFINZ's activities, including joint events and initiatives with the Financial Services Council and Empower Women, NZ Private Capital and CFA Society New Zealand. Collectively, these activities reflect INFINZ's ongoing commitment to a stronger, more connected and inclusive finance sector, supporting professional excellence, industry collaboration and opportunities for future generations.

ORGANISATIONAL RESILIENCE

The objective of this strategic pillar is to build a robust, sustainable and well-governed organisation, capable of delivering value to members and contributing to the wider finance ecosystem, both now and into the future. During 2025/26, INFINZ continued to strengthen its organisational capability, financial sustainability and operational effectiveness, while laying the foundations for its longer-term strategic direction.

The introduction of new and refreshed learning and development programmes strengthened the member value proposition while providing opportunities to diversify revenue streams. Investment in organisational capability was also reflected in the promotion of Bernice Archer to Chief Operating Officer and Faith Taylor to Events Manager, recognising their growing responsibilities, professional capabilities and contributions to INFINZ's operations and success. INFINZ recorded an improved financial performance in 2025/26, delivering a modest surplus. This reflected the successful onboarding of new Conference sponsors, increased subscription income and modest growth in operating expenses. Particularly encouraging was a 22% increase in sponsorship income, demonstrating continued industry support for INFINZ and its activities.

Looking ahead, INFINZ contracted with the New Zealand International Convention Centre (NZICC) to host both the annual Awards Dinner and Conference in 2027. This move will provide an opportunity to refresh these flagship events, enhance the experience for attendees and sponsors, and address capacity constraints affecting registrations and exhibitors at existing venues.



New Board Member
Asif Saleem



New Board Member
Gerry Symonds



INFINZ Distinguished Fellows
Alison Gerry & Mark Butcher



Jim McElwain
Executive Director
INFENZ

THE THREE STRATEGIC FOCUS AREAS FOR 2026/27 INCLUDE:

- Building our L&D programme
- Increasing engagement with private wealth advisers
- Growing the resilience of the organisation

NEW STRATEGY TO 2030

At its July 2026 meeting, the INFENZ Board approved a refreshed strategy, establishing a clear purpose, ambition and strategic priorities to guide the organisation through to 2030.

Our purpose is to enhance the dynamic performance of the financial services ecosystem, contributing to New Zealand's prosperity and wellbeing, now and into the future. Our ambition is to be recognised as a highly valued professional body that raises the capability and future fitness of professionals across New Zealand's finance ecosystem.

The refreshed strategy is built around three interconnected strategic pillars.

- **Member Capability Building** focuses on strengthening professional skills, knowledge and career development through high-quality education, mentoring and learning opportunities.
- **Improving Practice Across Industry** reflects INFENZ's commitment to raising professional standards and improving practice throughout the finance ecosystem, an area where the organisation considers it can make a particularly meaningful contribution.
- **Bringing the Community Together** is a new pillar that formally recognises the importance of industry connectivity. Through events such as the annual Conference and Awards Dinner, alongside mentoring and other engagement opportunities, INFENZ provides a platform for developing and nurturing professional relationships, collaboration and knowledge sharing.

Organisational financial sustainability and excellence, previously a standalone strategic pillar, has been repositioned as a strategic enabler, recognising its fundamental role in supporting the successful delivery of all three pillars. The refreshed strategy retains INFENZ's core values of **impactful, inclusive and sustainable**, providing continuity while establishing a clear direction for the organisation's future development.

FOCUS AREAS FOR 2026/27

INFENZ will continue to strengthen its member offering, industry engagement and organisational resilience through three key priorities.

- **Enhancing Learning and Development:** The Board and management are developing a new flagship Financial Services Leadership course for delivery in 2028, building on INFENZ's commitment to helping subject matter experts transition into broader commercial, operational & senior leadership roles.
- **Engaging Private Wealth Advisers:** Recognising the approximately 1,000 professionals providing sophisticated financial solutions to private wealth clients, INFENZ will strengthen its engagement with this sector. Initiatives include a new Private Wealth award and a dedicated continuing professional development (CPD) offering in 2027.
- **Strengthening Organisational Resilience:** INFENZ will continue to improve its financial and operational sustainability through new sponsorships and partnerships, alongside exploring HubSpot to better coordinate marketing activities. The move to the NZICC for both the Awards Dinner and Conference will also provide greater capacity for attendees and exhibitors.

2027 AWARDS PROGRAMME

The 2027 INFENZ Awards programme was formally launched at the Conference on 13 October 2026. Submissions close on 10 February 2027, with finalists announced in early April.

The Awards Dinner will take place on 13 May 2027, at the New Zealand International Convention Centre in Auckland, with tickets now available online. A new award will recognise excellence in financial advice provided by private wealth advisers and their supporting organisations, further broadening the programme's recognition of achievement across the finance sector. Building on the successful fundraising initiative in 2026, INFENZ will again support the First Foundation through a silent auction at the Awards Dinner, inviting members and sponsors to contribute towards educational opportunities for young New Zealanders.



INFENZ Chair Will Goodwin with First Foundation Scholars at the 2026 INFENZ Conference

INFENZ TWENTY-FOURTH AGM

Date: Thursday 19 November 2026

Venue: Bell Gully, Deloitte Centre, Level 14/1 Queen Street, Auckland

Timing: Networking drinks from 5.30pm, formalities at 6pm, with further networking from 6.30pm.

For quorum and catering purposes, please confirm your attendance by emailing Nicole Thomson on nicole@infenz.com. All members are welcome!



ACKNOWLEDGEMENTS

We acknowledge the entire INFINZ board and management for delivering the work programme outlined.

In particular, we thank board members who have retired since the last AGM: Tracey Walker, Stephan Deschamps and John Vanderbom. We appreciate their service and will formally acknowledge them at the AGM. Stephan chaired our Finance Committee and John our Conference Committee.

Lee Marshall and Jo Durcan were elected to the board at the 2025 AGM. We have recently welcomed Asif Saleem and Gerry Symonds as co-opted members, both of whom will stand for election at the AGM. Following Anna Wu's departure as Chair of the Auckland Young Women in Finance group, Alex Lusty has succeeded her as a board observer. We thank Anna for her contribution and welcome Alex.

We also acknowledge the dedication of INFINZ staff in delivering another highly successful conference, our extensive events and L&D programme, and our iconic Awards Dinner. Our thanks go to Bernice Archer, COO; Iona Gibbs, Administration Manager; Faith Taylor, Events Manager; and Penne Clayton, Marketing Coordinator. We also welcomed Nicole Thomson earlier this year as a contracted Event Coordinator and are pleased that she has now joined our permanent staff.

Finally, our sincere thanks to all members, sponsors and volunteers, including our reference groups (YWF, YFP and ELG boards), mentors, speakers and awards judges.

We wish everyone a well-earned summer break and look forward to INFINZ and its members continuing to respond to the challenges and embrace opportunities in the year ahead.

Ngā mihi nui
WILL GOODWIN
CHAIR, INFINZ

Ngā mihi nui
JIM MCELWAIN
EXECUTIVE DIRECTOR, INFINZ

APPROVAL OF ANNUAL REPORT

The chair and board are pleased to present the Annual Report of the Institute of Finance Professionals New Zealand Inc., including the financial statements, for the 12 months ending 30 June 2026.



WILL GOODWIN
CHAIR, INFINZ
10 OCTOBER 2026



ELLIOT SMITH
CHAIR, FINANCE COMMITTEE
10 OCTOBER 2026

YOUR SUPPORT AND FEEDBACK IS ENCOURAGED

Thank you for your support, especially over the past year, as the organisation could not thrive without it.

Please contact Executive Director Jim McElwain at jim@infinz.com with any feedback or offers of assistance, which would be much appreciated

DIRECTORY

BOARD MEMBERS

(meetings attended/held since 2025 Annual Report)

- **Will Goodwin**, INFINZ (Cert) Chair (4/5)
- **Sarah Minhinnick**, INFINZ (Cert) Deputy Chair (2/5)
- **Stephan Deschamps**, INFINZ (Cert) (4/5)
- **Danica Hape-Tiria**, INFINZ (Cert) (3/5)
- **Carolyn Ng**, INFINZ (Cert) (4/5)
- **Stephen Ridgewell**, INFINZ (Cert) (3/5)
- **Elliot Smith**, INFINZ (Cert) (4/5)
- **John Vanderbom**, INFINZ (Cert) (2/3)
- **Tracey Walker**, INFINZ (Cert) (1/3)
- **Andrew Woodward**, INFINZ (Cert) (5/5)
- **Josephine Durcan**, INFINZ (Cert) (4/4)
- **Lee Marshall**, INFINZ (Cert) (4/4)
- **Asif Saleem**, INFINZ (Cert) (2/2)
- **John Machell**, INFINZ (Cert) (0/1)

FIRST (NON-VOTING) MEMBER

- **Annie Zhang**, INFINZ (Cert)

BOARD OBSERVER (NON-VOTING)

- **Alex Lusty**, (Chair, Young Women in Finance Auckland)

STAFF

- **Jim McElwain**, INFINZ (Fellow), Executive Director
- **Bernice Archer**, Chief Operations Officer
- **Iona Gibbs**, Membership & Administration Manager
- **Faith Taylor**, Events Manager
- **Nicole Thomson**, Events Co-ordinator
- **Penne Clayton**, Marketing & Communications Co-ordinator

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ACCOUNTANTS: KPMG

AUDITORS: Grant Thornton

BANKERS: Bank of New Zealand, ANZ

SOLICITORS: Chapman Tripp