



Institute of Finance Professionals New Zealand Inc.

# **Financial Markets Operations Association**

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Institute of Finance Professionals New Zealand Inc

# Who is INFINZ?

- INFINZ is an industry body for individuals working or participating in the finance and capital markets of New Zealand.
- INFINZ believes strongly in professional conduct, ongoing professional development and individual accreditation
- INFINZ has a focus on advocacy, educational opportunities, national industry events, member presentations, and now special interest groups
- INFINZ is active on submissions and, where appropriate we will lead industry discussion on matters of importance

# What does INFINZ Stand For?

- INFINZ has a core belief that we must keep the New Zealand markets relevant, effective and efficient.
- INFINZ believes that industry participants must operate professionally to a high standard and invest in their professional development
- INFINZ has at its core a Code of Ethics and Standards of Professional Conduct and a strong disciplinary process

# Who are the Members of INFINZ ?

- INFINZ Membership consists of:

– Certified Members	453
– Non-certified Members	194
– Students	12
- Certified Members are those people who qualify for accreditation by meeting educational and experience criteria
- Non-certified members are those who are associated with the industry but who don't actively participate in it or don't want accreditation

# Who are the Members of INFINZ ?

- Certified Members

- Certified Securities Analyst Professionals 171
- Certified Treasury Professionals 163
- Certified Finance & Investments Professionals 119

- What do the members do

- Broker 82
- Consultant 41
- Corporate 120
- Investments 72
- Academic 12
- Accountant 20
- Student 12
- Banker 105
- Investment Banker 26
- Government 31
- Service 50
- Lawyer 23
- Other 65

# What do the Members get?

- Accreditation & recognition
- Representation
- Access to member benefits
  - Publications
  - Meetings & Special Interest Groups
  - Networking
  - National Events
  - Access to permanent resourcing
  - Education opportunities

# Education

- INFINZ does not offer education under its own auspices
  - Don't have the resources to offer or accredit providers
  - Quality delivery of education can be sourced quite easily
- INFINZ is now attracting education providers:
  - Proficio (Intuition) on line
  - Finance & Treasury Association
  - Association of Corporate Treasurers
  - Financial Services Institute of Australasia
  - AFMA Services

# Benefits of Amalgamation

- More events
- Offshore component to events – leads through “insto”
- Sponsorship benefits for events – speakers, costs
- Accreditation, Education & training
- Publications
- Being part of the Industry

# Issues for Amalgamation

- Individual accreditation – process needs to be established
  - Grandfathering & Ongoing
  - Who will benefit from the current corporate membership fee?
- Representation within Board and Management structure
  - Standing Committee? – would require INFINZ constitutional change
  - Board Committee?
  - Event representation - ensure FMO interests are met
  - Advocacy matters – can co-opt