



SEMINAR PLANNING MANUAL

"NZ Endless Summer Sanctuary Investment Seminar Series 2025-26"

Foreword by Linda Brink

US Showcase Developer and **"Endless Summer"** Seminar Series Organizer



Since returning home to my hometown of Ft Lauderdale, the "world's yachting capital" I am now actioning on my plan to repurpose my family's 43 year old realty office into a permanent **"Invest in NZ"** Showcase of NZ investment products that support a "Residency-By-Investment" visa application by High Net Worth American Baby-Boomers looking to intergenerational sanctuary investing in New Zealand.

To target this demographic, I am licensed to use the evocative imagery from the iconic 1960's surfing movie **"The Endless Summer"** to support a **"NZ Endless Summer Sanctuary Investment Seminar Series"** here in Ft Lauderdale where I have a range of magnificent yacht clubs at which to host this quarterly seminar series during 2025-26. Launching at the Lauderdale Yacht Club this coming October.

In a troubled world, New Zealand is increasingly seen as the safest country in the world. Putting the country into a prime position to deliver something exclusive and desirable for high-net-worth baby boomers who are interested in securing an intergenerational, "Endless Summer" delivering family sanctuary in New Zealand as part of both their asset and lifestyle diversification.

I have set out in this manual how I plan to turn this seminar series into an instantly recognizable, branded **"Signature Series"** and how I am going to market it effectively to my target audience.

Linda Brink
US Resident Director



Template for High-End Event Planner

Subject: High-End Event Planning for Endless Summer branded Investment Seminar Series.

Location: Lauderdale Yacht Club, Fort Lauderdale, FL

1. Project Overview

Because of the evocatively nostalgic branding of the seminar series, I will be working with a full-service event planning firm to manage the production of a quarterly **NZ “Residency-By-Investment” seminar series**, launching at the **Lauderdale Yacht Club** in Fort Lauderdale, FL. The event targets **high-net-worth baby boomer investors** interested in intergenerational sanctuary asset investing in **New Zealand**, evoking a renewed sense of foreign adventure for the boomer demographic

The launch event will feature as Keynote Speaker, **Stuart Nash**, former NZ Minister of Economic Development and architect of the **Active Investor Plus (AIP)** residency program which in Q2 of 2025, saw applications in excess of \$1.15B filed to start the investor visa residency process.

2. Scope of Works to include:

- **Venue coordination** (in partnership with Lauderdale Yacht Club)
- **Guest list & RSVP management** (potentially including private invitation design/mailing)
- **Speaker logistics** (presentation setup, tech, hospitality for Stuart Nash)
- **Audiovisual production** (slides, livestreaming, microphones, lighting)
- **Luxury event décor and branding**
- **High-end catering coordination**
- **On-site registration and guest experience management**
- **Gifting / printed takeaway materials**

3. Event Details

- **Event Name:** ***NZ Endless Summer Sanctuary Investment Seminar Series***
- **Frequency:** Quarterly (4 events/year)
- **First Event Target Date:** (Target Month, October 2025)
- **Time:** Evening (approx. 5:30–8:30 PM)
- **Launch Venue:** Lauderdale Yacht Club, Fort Lauderdale FL
- **Target Audience:** HNW investors, private wealth advisors, family offices
- **Attendees per event:** Restricted to not more than 60, invite-only delegates.
- **Keynote:** Stuart Nash, former NZ Minister of Economic Development.

5. Submission Details

In my RFP's (Request for Proposals) that I am now sending out to leading event/seminar organizers in Ft Lauderdale, I am also asking them to include any additional ideas or enhancements that they believe would elevate the brand prestige and memorability of the event.

Linda Brink

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SEMINAR STAGING MANUAL

As an American Baby-Boomer who has lived in New Zealand, now through a “*follow-the-sun*” seminar series, I am aiming to create an immersive and compelling experience for high-net-worth (HNW), fellow American baby boomers who not only want to intergenerationally invest in New Zealand but also spend their winter months there. Creating a seamless “Endless Summer” as they fulfill the requirements of the New Zealand Active Investor Plus (AIP) visa. The combination of living a safe and secure rural sanctuary lifestyle in the world’s safest country while working on an active business investment, combine to deliver a compelling investment case. A combination that must be built into both the seminar planning and marketing strategy.

1. Refining the Concept:

- **Creating an Immersive Experience:** The “Endless Summer” theme is to be leveraged to create a unique atmosphere. This will include transforming a seminar venue into an environment that transports guests to New Zealand through décor, food, music, and possibly, virtual reality experiences that portrays living on an income producing, sanctuary lifestyle orchard in New Zealand during the US winter months while also taking an active interest in their AIP investment that underwrote the issuance of their residency visa.
- **High-End Personalization:** Arranging personalized experiences for the attendees such as private meetings with Stuart Nash, our launch Keynote Speaker must be highlighted. Tailored investment showcases, and bespoke networking opportunities with other wealthy individuals looking for similar investments will be encouraged through personalization.
- **Exclusive Brand Partnerships:** Partnering with high-end NZ luxury brands that align with the values of our target demographic to co-sponsor the series will be sought. This could include partnerships with yachting companies, rural and upmarket real estate firms and premium wine/food producers to provide samples to add hospitality and prestige to the event.
- **Elite Atmosphere:** Ensuring that the event feels exclusive requires invite only to maintain an intimate, immersive feel and to reinforce the sense that the event is highly desirable.

2. Positioning the Event as a “Signature Event”:

- **Leveraging our NZ investor visa Speaker:** Stuart Nash is a major draw for our launch seminar given his role in shaping New Zealand's immigration investment landscape. This means presenting his attendance as a unique opportunity to hear directly from the architect of New Zealand’s Residency By Investment (RBI) program.

In particular, to highlight to our audience, the insider knowledge he’ll provide on the evolving landscape of New Zealand’s investor visa program and the economic benefits of intergenerational, sanctuary investing in New Zealand.



- **Focus on Lifestyle and Legacy:** Baby boomers are increasingly looking for legacy assets that can be passed on to future generations. For this reason, the event must be framed as an opportunity to not only make an investment but also create a lasting sanctuary for their families with an emphasis on the safety, security and long-term value of (1) owning a New Zealand sanctuary asset while (2) with a focus on regional New Zealand, supporting the growth of New Zealand's new genre of Emerging Growth Companies.
- **Offer Supportive Perks:** Being a service already provided by Nash Kelly Global, a seminar series sponsor, attendees will have access to follow-up consultations and curated listings of NZ investments available for discussion after the seminar. Including a concierge service to assist them with every step of the investment and visa process.

3. Creating a Powerful Marketing Strategy:

(a) Digital Marketing:

- **Highly Targeted Ads:** I plan on using LinkedIn's advanced targeting to reach affluent baby boomers and individuals interested in international wealth management. Tailoring these ads specifically to those who have an interest in New Zealand investment.
- **Content Marketing:** We plan to present articles and videos that feature speakers such as Stuart Nash discussing the potential of investing in New Zealand and how the Residency By Investment program benefits affluent investors. Ideally these articles should be shared across our website and that of any NZ based sponsors and include email newsletters, and social media channels. All supported by blog posts, infographics, and short-form videos with teasers of what attendees can expect.
- **Email Campaigns:** Building a well-crafted, CRM hosted list of qualified email leads is a must do. On the launch seminar we will be working with Nash Kelly and collectively leverage existing networks to send out material relating to the seminar series and its uniqueness.
- **Partnerships with Influencers:** Working with social media influencers, lifestyle bloggers and businesses that cater to the high-net-worth demographic will help promote the seminar series, aiding awareness and adding further credibility.

(b) Traditional Marketing:

- **Direct Mail Invitations:** From his years in Government, including ministerial roles and as our launch seminar Keynote speaker, Stuart Nash and his company would have a huge network to which a personalized invitation could be sent as part of building the attendee pool.
- **Magazines & Newsletters:** Cost and reach does not make traditional media magazines an option at this time. Newsletters will be progressively phased in as the CRM data base expands prospect / partner connecting.



- **Strategic Partnerships:** Collaboration with wealth management firms and family offices to send out invitations to their clients in our early days “bread and butter” prospecting as these entities are able to help tap directly into our target audience.

(c) Event Partnerships:

- **Host Organizations:** Partnering with organizations such as yacht clubs, private clubs, premium wine producers, merchant bankers, wealth advisory firms to co-host / promote the series. These endorsements adding credibility while attracting a qualified audience.
- **Leverage Referral Programs:** Encourage well-connected individuals to refer potential clients.

4. Enhance the Attendee Experience:

- **Welcome Packages:** Upon arrival, give attendees a uniquely NZ welcome package, possibly including a bottle of premium New Zealand wine, branded items, or access to proprietary information on investment opportunities already approved for AIP visa issuance purposes.
- **Networking Opportunities:** Position the seminar as a premium networking event, not just a learning opportunity. Maybe arrange for small-group networking sessions where participants can discuss opportunities with the speaker and each other in an informal setting.
- **Live Demonstrations:** Depending on the nature of the properties or sanctuary options being discussed, offer virtual property tours, presentations, or live demonstrations of what life in New Zealand could look like for potential American investors.

5. Post-Event Follow-Up:

- **Exclusive Access to Resources:** As seminar sponsors, Nash Kelly Global will be able to offer attendees access to follow-up consultations with Stuart Nash and private tours of New Zealand properties for those seriously considering the investment.
- **Create an Ongoing Relationship:** By building a community around the “Endless Summer” theme, we are creating a unique group with a shared interest that will build long term relationships. This opening the door to building a community where attendees can share information, insights, and experiences about their investments in New Zealand.

Appeal to Emotional Drivers

While baby boomers are driven by legacy, nostalgia, lifestyle, and security, we will emphasize how the NZ “Residency-By-Investment” program supports their vision for family, freedom, long-term well-being and their desire to own an intergenerational asset in NZ that can be passed on. A sanctuary for their families to return to year after year in a safe and stable country in a troubled world.



SEMINAR MARKETING MANUAL

The purpose behind this seminar series is to encourage HNW American baby boomers to spend the US winter months in New Zealand, thus creating an "endless summer" all year round. Living in New Zealand, during the US winter months, actively working on their NZD5,000,000 "growth" investment made into a New Zealand company that was part of the investor visa requirements while enjoying living on their rural residential sanctuary lifestyle orchard which they invested in as part of their investor visa investment package. This dimension will be built into both my seminar planning and marketing as follows.

1. Seminar Planning – Creating the "Endless Summer" Experience

To fully capture the essence of an intergenerational "Endless Summer" lifestyle and to create a unique, compelling experience that integrates both the lifestyle and investment components.

(a) Event Theme and Structure

- **The "Endless Summer" Pitch:** Seminars will frame the concept of an "Endless Summer" lifestyle. Living in New Zealand's temperate climate during the U.S. winter months (which is summer in New Zealand). Emphasizing the contrast, i.e., escape the harsh U.S. winter and living in a safe and serene, nature surrounded environment on a rural sanctuary.

Example Session Breakdown:

- **"The Endless Summer Lifestyle":** Showcase of rural living in New Zealand. Will highlight the benefits of owning an agribiz focused, residential sanctuary orchard lifestyle with great scenery, outdoor activities, and the rural culture that is the New Zealand way of life
- **"Turning an Investment into an intergenerational future":** To discuss how the NZD5,000,000 investment in a New Zealand business will allow the investors to meet the visa requirements, while actively contributing to the growth of the economy.
- **"Living the Dream – Owning a Sanctuary"** To introduce the idea of a relaxed, safe and secure rural lifestyle. Perhaps build a legacy home on expansive land while enjoying a rural orchard lifestyle and having the flexibility to divide time between business growth and personal pleasure.

(b) Keynote Speakers:

- **Expert Insight on Residency by Investment & Active Investor Plus (AIP):** As the launch seminar Keynote speaker, Stuart Nash to discuss how the AIP program facilitates the ability for HNW investors to not only meet visa requirements but also embrace a new adventure in New Zealand.



- **Business Integration with Lifestyle:** Speakers to elaborate on how investing in New Zealand's rural / regional businesses benefits the economy, and how investors can integrate their investment while enjoying their "Endless Summer" lifestyle in New Zealand.

(c) Engaging Experiences:

- **Showcase New Zealand's Unique Rural Properties:** Virtual tour presentations showcasing a variety of lifestyle rural properties that would deliver residential sanctuary bliss, appealing to the lifestyle diversification desire of our target demographic. This achieved through emphasizing the peace and serenity of owning an orchard as a residential sanctuary.
- **Cultural Integration:** Host a brief segment where we bring in elements of New Zealand's lifestyle, such as food, wine, and a short cultural presentation that gives attendees a taste of what living out their "Endless Summer" lifestyle in New Zealand will look like.

(d) Personalized Investment Strategy Session:

- **Investment Workshops:** Offer small workshops where attendees can learn about structuring their NZD5,000,000 investment, how the AIP program works, and how they can deploy their investment while meeting residency requirements.

2. Marketing Strategy – Targeting the Right Demographic

The marketing will seek to blend the idea of an Endless Summer lifestyle in rural New Zealand, with the practicality of fulfilling the visa requirements. The overall message to be aspirational but practical for HNW baby boomers.

Targeted Messaging:

- **Position the "Endless Summer" as a Lifestyle Choice, Not Just a Winter Escape:**

The messaging resonating with the desire for both an idyllic lifestyle and sound investment with focus on the safety and sense of adventure that comes with living in New Zealand. Especially during the U.S. winter, living out an "Endless Summer".

- **Link the Investor Visa and Investment Requirement to Lifestyle Goals:**

The visa program is presented as an opportunity to secure residency and invest in an intergenerational future.

By focusing on the lifestyle benefits—escape from U.S. winters, enjoying New Zealand's "Endless Summer" journey and having an active role in growing a business investment that accords with the practicality of the AIP visa requirements, we will **progressively position the seminar series as a must-attend for HNW American baby boomers looking to embark on a new adventure in NZ.**



SEMINAR PROCEDURAL MANUAL

Planning and executing a successful seminar for high-net-worth (HNW) attendees at an exclusive location such as the Lauderdale Yacht Club is all about attention to detail, seamless execution, and offering an experience that reflects the high standards of your audience. Below is listed the key logistics and considerations to ensure everything runs smoothly, creating a positive, lasting impact.

1. Venue and Ambience – Setting the Right Tone

Since yacht clubs are high end venues, they deliver a strong foundation that enables the location to align with our "Endless Summer" theme, creating a seamlessly immersive experience:

(a) Venue Setup:

- **Signage & Welcome:** We will have Maoritanga themed signage at the entrance welcoming attendees. This theme to appear in directional signs around the venue to guide delegates. A marae style entrance arch (waharoa) to be placed at the entrance to the seminar room which ideally should also feature Poupou panels to create a wharenuī ambience.
- **Event Space Design:**
 - **Main Seminar Room:** Set up in a way that feels intimate and high-end with comfortable seating in a formation that encourage a more conversational atmosphere. The incorporation of décor like Poupou will create a uniquely New Zealand ambience.
 - **Breakout Area:** These will be a discreet area where attendees can talk privately, away from the main seminar room.
 - **Lighting & Sound:** Soft lighting to enhance the ambience. Main seminar room well-lit for presentations with high-quality sound equipment for the emcee and speakers.
- **Decor & Branding:** Elements such as Māori-inspired patterns on tablecloths or name tags, with high-quality images of New Zealand landscapes / tribal culture projected on screens would all help build the desired immersive effect.

(b) Registration Desk:

- **Welcome:** Dedicated registration desk where attendees check in, receive personalized name badges, be passed seminar materials and offered boutique New Zealand wines as they arrive to add to the memorability of the seminar.
- **Concierge Service:** A concierge-style service for requests such as booking private meetings with the speakers, to discuss travelling to NZ will be made available to ensure that everything is perceived as effortless. A service offered by our launch sponsor, Nash Kelly.



2. Speakers and Content Management

Content quality and its delivery will directly impact the success of the seminar. Given Stuart Nash's keynote speech/role, a smooth flow of seminar and speaker coordination is essential.

(a) Keynote Speaker (Stuart Nash) Setup:

- **Personal Introduction:** Strong introduction to the Keynote speaker (Stuart Nash). Present his credentials and in particular his role in creating the AIP program. This setting the stage and building credibility with the audience.
- **Q&A Session:** Allow time for questions at the end of Keynote address.

(b) Agenda

- **Welcome and Introduction:** 15 minutes
- **Opening Remarks (the "Endless Summer" concept):** 10 minutes
- **Keynote Address (Stuart Nash's Insights on AIP & Investment):** 45 minutes
- **Break (Refreshments & Networking):** 20 minutes
- **Investment and investor visa workshop session:** 45 minutes
- **Lifestyle sanctuary Investment presentation (orchard videos):** 30 minutes
- **Q & A Session:** 15 minutes
- **Closing Remarks & Next Steps:** 10 minutes

3. Catering and Refreshments – A Touch of NZ

All food and drink offerings should reflect the taste of New Zealand

Food & Beverage: New Zealand wines. Finger snacks with a "Kiwi" touch.

Coffee Station Runs continuously. Offers NZ chocolate, sweets and cookies when event closes and the post-seminar hospitality suite opens.

4. Networking and VIP Experiences

As networking is a major component for HNW individuals. Typically delegates will want to interact with each other, the speakers etc. The following is proposed to support this experience.



- **Post-Seminar Networking Reception:** A post-seminar cocktail hour in a hospitality suite / room in the club where attendees can mingle with each other and the speakers.
- **One-on-One Consultations:** Offer attendees the opportunity to book one-on-one time with the Speakers. Ideally with advisors or property experts. Organize private consultations with Stuart Nash the following day for the most engaged prospects.

5. Logistics and Operations – Smooth and Seamless

Because the logistics of the event need to be meticulous, we will be working with professional seminar advisors to ensure smooth event coordination, privacy and security.

6. Attendee Materials:

- **Event Brochures and Takeaways:** Printed materials detailing the benefits of investing in New Zealand, the visa requirements, available investments and a timeline for the process will be made available. This to include information about the post-seminar steps.
- **Gifts Bags:** An offer of a bottle of New Zealand wine would be a great *“thank-you for attending”* gift.

7. Follow-Up Strategy Post-Event

Because maintaining delegate contact is key to converting seminar interest into action, the following is proposed:

- **Personalized thank-you notes:** Linda to attend to this
- **Post Seminar Interaction:** Nash Kelly to lead this process.

In Closing:

With meticulous planning and attention to detail, our “Endless Summer” seminar will not only attract HNW attendees but will also leave them with a lasting impression, ready to invest in an exciting lifestyle diversification adventure in New Zealand. The world’s safest country.

Linda Brink – Seminar Series organizer.
Fort Lauderdale, FL
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