

**APPENDIX ONE:**  
Position Description



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POSITION TITLE: Head of Commercial Finance

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LOCATION: Tauranga or Auckland

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PEOPLE LEADER: Chief Financial Officer

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TEAM: Finance

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At Craigs (CIP) we are focused on helping our clients to achieve their financial goals and grow their wealth. We believe that where a client's financial future is concerned, our people are fundamental to achieving this. Our collective skills, knowledge and commitment means that we can provide the best possible outcomes for our clients.

Our Finance team partner with senior leadership to translate financial data into strategic insight. It's a team where intellectual curiosity meets commercial rigour, and where the work you do genuinely helps to shape the direction of the business. A key aspect of the role will include working with the Strategy team to support the Craigs Investment Partners' growth strategy via Mergers and Acquisitions (M&A) and product development.

Based at Head Office in Tauranga (or Auckland), this role offers a rare blend of modelling depth and strategic visibility, working closely with the CFO, Head of FP&A, Strategy team, and senior leadership to build and maintain models that underpin Craigs' long-range planning and strategic decision-making. Reporting to the Chief Financial Officer, this role also supports the wider Executive team including the Chief Strategy Officer and Chief Wealth and Markets Officer.

## WHAT I DO

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- Support the development of Craigs' business strategy, including business case preparation, review key capital projects, joint ventures, potential M&A targets, and other strategic partnership opportunities
- Create, maintain and own sophisticated financial models to provide projections and scenario outputs supporting strategic decisions, business performance, and growth opportunities e.g. product development, profitability optimisation
- Provide financial analysis to address Board and Executive team information requests
- Analyse business units to determine areas of improvement
- Support business efficiency and cost reduction initiatives to ensure savings targets are delivered
- Work as part of larger project teams and manage projects through to successful conclusion
- Build strong relationships across the organisation, acting as a trusted partner to business leaders and fostering collaboration
- Demonstrate the Craigs' values every day and encourage, support and enable my colleagues to do so also

## NZX RULES REFERENCED WITH LEGISLATION AND POLICY

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The NZX Participant Rules can be found electronically at the following address -

<https://www.nzx.com/regulation/nzx-rules-guidance/participant-guidance>

CIP POLICIES CAN BE FOUND ON THE STAFF INTRANET.

## WHAT I VALUE

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### Our Values



We are stronger together



We strive for excellence



We put people first



We do what's right

At Craigs, we pride ourselves on creating an environment where our people feel they belong and can bring their best self to work and feel valued. We grow as a team and with our clients and are always looking to support our communities – both internal and external. Our values build the foundation of how we work and how we provide great outcomes for our people and our clients.

## WHAT I BRING

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### Qualification

- Relevant degree level tertiary qualification, preferably post-graduate, in an applicable area

### Knowledge and Experience

- 5+ years' experience in strategy consulting, investment banking, or a strategy role at large corporate preferred
- Proven M&A experience
- Reasonable level of industry knowledge in financial services
- Experience working across multiple projects

### Skills and Attributes

- Advanced Microsoft Excel skills with a strong emphasis on financial modelling, including scenarios, sensitivity analysis, and clean, auditable model architecture.
- Strong analytical and problem-solving skills
- Excellent communication and relationship building skills
- Well-developed commercial acumen
- Experience working across multiple projects, and is organised and proactive
- Driven with desire to make a difference and build your career
- Self-starter who takes ownership of their work, shows initiative, and thrives in a dynamic environment where priorities can shift.