

POSITION TITLE:	Head of Alternatives
LOCATION:	Auckland or Tauranga
PEOPLE LEADER:	Head of Investment Strategy Group
TEAM	Investment Strategy Group (ISG)

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.

The ISG team is a trusted centre of investment excellence; providing thought leadership, rigorous research and disciplined portfolios for advisers and clients. The Head of Alternatives is responsible for building and leading our alternatives investment capability, including research, product strategy, portfolio integration and adviser and client education. The role partners closely with the Specialised Wealth Advisory Team (SWAT) and will help shape the strategic role of alternative investments within client portfolios at Craigs. This role also has people leadership responsibility, providing clear direction, coaching, development and support, to enable high performance and continuous growth.

WHAT I DO

- **Alternatives investment framework:** Develop, maintain and continuously improve Craigs' alternatives investment framework, including governance, manager selection criteria, due diligence standards, portfolio construction principles, appropriate model portfolios and ongoing review processes.
- **Research and due diligence:** Lead research and investment due diligence across a broad range of alternative asset classes encompassing growth, income and diversifying strategies, including but not limited to private equity, private credit, insurance linked strategies, infrastructure, real assets and hedge funds.
- **Investment strategy and portfolio integration:** Work closely with senior investment leaders in ISG/SWAT and other key stakeholders (including the Investment Committee) to determine the strategic role of alternatives within diversified client portfolios and across different risk profiles, investment objectives and client types.
- **Opportunity assessment and pipeline:** Identify, screen and evaluate high-quality alternative investment opportunities, maintaining a forward-looking pipeline of relevant strategies, managers and market developments.
- **Monitoring and governance:** Monitor existing alternative investments, assessing performance, risk, portfolio fit, manager developments and ongoing suitability (including where appropriate removing from model portfolios), and contribute to relevant investment committee and governance processes as required.
- **Stakeholder partnership:** Partner with internal stakeholders across ISG, SWAT, Investment Advisers and operational teams to support the effective assessment, implementation and monitoring of alternative investment opportunities.
- **People leadership:** Lead, coach and develop direct report/s, setting clear expectations, providing regular feedback, supporting capability development and fostering a collaborative, high-performing team environment.
- **Manager and industry relationships:** Build and maintain strong relationships with top domestic and global investment managers, research consultants, market experts and other relevant external parties. Represent Craigs, where appropriate, on alternative asset governance bodies such as Limited Partner Advisory Committees.
- **Adviser education and enablement:** Design and deliver adviser education programmes, training sessions and workshops that build understanding of alternative investments, including investment rationale, risks, benefits and implementation considerations.

- **Research communication:** Produce clear, high-quality research content and commentary for advisers and clients, translating complex alternative investment concepts into practical and accessible insights.
- **Best practice and continuous improvement:** Remain current with developments across alternative investments, market developments, regulation, fund structures and industry best practice, and contribute to broader ISG investment process and governance initiatives.
- Any other tasks as required by your manager.

WHAT I VALUE



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 clients.

WHAT I BRING

- Tertiary qualification in Commerce, Finance, Economics or a related discipline and / or a CFA charter holder.
- Deep expertise across alternative investments, including private markets and diversified strategies.
- Significant investment experience, ideally within portfolio management, research, portfolio construction, wealth management, product strategy or a related environment.
- Strong understanding of financial markets, economic cycles, strategic and tactical asset allocation, and the integration of alternatives into diversified portfolios.
- Advanced quantitative, analytical and commercial judgement, with the ability to assess performance, risk, portfolio outcomes and suitability for different client objectives.
- Strong written and verbal communication skills, with the ability to explain complex investment concepts clearly and credibly to advisers, clients and other stakeholders.
- Proven ability to build trusted relationships and influence across internal teams, external managers, research consultants and other industry participants.
- Demonstrated people leadership capability, including the ability to coach, develop and support direct reports through clear expectations, regular feedback and constructive performance conversations.
- Collaborative leadership style, with the ability to build trust, bring people along, and create an environment where others are empowered to contribute, learn and grow.
- Sound judgement, integrity and a client-first mindset.
- Curiosity, resilience and a proactive approach to continuous improvement, innovation and industry best practice.

NZX RULES REFERENCED WITH LEGISLATION AND POLICY

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.