

POSITION TITLE:	Director, Specialised Wealth
LOCATION:	Auckland
PEOPLE LEADER:	Head of Specialised Wealth Advisory
TEAM	Specialised Wealth Advisory Team (SWAT)

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 SWAT team is the premium service level for Ultra High Net Worth (UHNW) clients at Craigs, offering elevated service, specialist expertise and tailored advice to attract, deepen and retain UHNW client relationships of varying complexity. The Director, Specialised Wealth role is a senior origination and client leadership role responsible for building the SWAT proposition, supporting advisers with complex UHNW opportunities, contributing to strategic advice and investment discussions, and delivering a high-quality client experience. The role works closely with the wider Private Wealth team, including the Investment Strategy Group (ISG) and other specialist teams where relevant.

WHAT I DO

- Originate, develop and support new UHNW client opportunities, working closely with advisers and senior leaders to position Craigs as the provider of choice for complex wealth clients.
- Lead and contribute to client consulting activities, including strategic asset allocation discussions, SIPO reviews, investment strategy development, client education workshops and tailored advice projects.
- Present confidently and articulately to UHNW clients, prospects, advisers and external stakeholders, including through pitch presentations, client meetings, conferences and other internal or external forums.
- Prepare, contribute to and review RFP responses, pitch materials, presentations and client proposals to support new business development and retention of significant client relationships.
- Identify areas for improvement in SWAT processes that improve client outcomes, including oversight of the management of client portfolios and reporting.
- Proactively market SWAT internally and externally, building adviser awareness, strengthening referral pathways and helping to extend Craigs' reputation in the UHNW market.
- Maintain visibility of SWAT client pipelines, mandate coverage, service levels and new client and existing client re-tender opportunities to support business development and client retention.
- Work alongside the Head of SWAT, advisers, ISG and other specialist teams to enhance the SWAT service offering and deliver high-quality portfolio insight for complex clients.
- Developing best practice portfolio implementation guides for SWAT accounts and helping to translate ISG models into SWAT client portfolios.
- Assist in managing any client portfolios that are centrally managed by SWAT without a local branch adviser.
- Support the development of responsible investment and sustainability capability for large mandate clients, including advice on responsible investment policies where relevant.
- Travel regularly to attend client meetings and business development opportunities alongside advisers and other Craigs' representatives.

- 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

- Relevant tertiary qualification in Finance, Commerce, Economics, Law or a related discipline.
- CFA or New Zealand Certificate in Financial Services (Level 5) with the Investment Strand (desirable).
- Significant experience working with UHNW, wholesale, institutional, family office, trustee or other complex client segments.
- Strong understanding of investment markets, portfolio construction, strategic asset allocation, portfolio theory and client advice frameworks.
- Proven business development capability, including the ability to identify opportunities, build trusted relationships, support RFP processes and convert complex prospects into long-term client relationships.
- Excellent written, verbal and presentation skills, with the confidence to simplify complex investment concepts for clients, advisers and senior stakeholders.
- Strong commercial judgement, strategic thinking and the ability to contribute to the ongoing development of a differentiated UHNW client proposition.
- High attention to detail, sound analytical capability and proficiency using Microsoft Excel, PowerPoint and Word (including use of AI tools) to produce high-quality client and internal materials.
- Collaborative working style, with the ability to influence across teams, operate independently when required and work constructively within Craigs' policies, procedures and regulatory obligations.

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.