

APPENDIX ONE:
Position Description



POSITION TITLE:	Sustainability Associate
LOCATION:	Tauranga
PEOPLE LEADER:	Senior Sustainability Analyst
TEAM:	Private Wealth Research

At Craigs, 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 Private Wealth Research (PWR) team coordinates and delivers all aspects of the firm's investment views for its private clients, as well as sustainability views. Value is added to clients at many levels including in-depth sustainability analysis and reporting, security selection and analysis, morning meeting contributions, presentations and other forms of marketing, as well as high service standards.

PWR covers listed equity securities in New Zealand, Australia, Asia, Europe and North America, fixed income, currencies, portfolio strategy, economics and corporate actions. It is disseminated to our Investment Advisers as well as clients.

As a Sustainability Associate, I help develop, maintain and continually improve the sustainability framework Craigs uses to assess companies and securities from an environmental, social and governance perspective. This includes engaging with companies, as well as working with our Investment Advisers (and with some clients on a direct basis) to ensure portfolios are aligned with client values.

I report to and support the Senior Sustainability Analyst. I also support the other members within the PWR team, particularly in relation to the funds we research.

WHAT I DO

- Inform and educate clients and Investment Advisers about the Craigs sustainability framework.
- Engage with external stakeholders to ensure sustainability assessments are maintained.
- Raise the awareness of Craigs' sustainability work externally.
- Work with Investment Advisers to incorporate sustainability screening and values into client portfolios.
- Support other team members in PWR, particularly in relation to the funds we research.
- Assist and provide support to Investment Advisers, other departments and other team members as required.
- Contribute to morning meetings and other research calls with Investment Advisers.
- Present to Investment Advisers, clients and referral sources around New Zealand.
- Contribute to other forms of marketing, where appropriate.
- Demonstrate Craigs' values every day and encourage, support and enable my colleagues to do so too.

NZX RULES REFERENCED WITH LEGISLATION AND POLICY

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

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

Craigs' policies can be found on the Intranet.

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 our clients.

WHAT I BRING

- A tertiary qualification in finance, commerce, business, science or sustainability.
- An interest in global sustainability trends, financial markets, portfolio management and investment analysis.
- A passion for finance and sustainable investing.
- Microsoft Excel, Word and PowerPoint skills.
- Effective communication skills, in both verbal and written forms.
- Adept at taking a collaborative approach to working with a range of stakeholders.
- Well-developed empathy skills for working with clients and team members.
- A flexible, growth mindset to initiate positive change in a dynamic environment.
- Ability to work as part of a team.