APPENDIX ONE:
Position Description

POSITION TITLE:	Financial Modelling Analyst (FP&A)
LOCATION:	Head Office or Auckland
PEOPLE LEADER:	Head of Financial Planning and Analysis
TEAM:	Finance (FP&A)

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 FP&A team sits at the heart of Craigs' Finance function, partnering with senior leadership to translate financial data into strategic insight. We own the planning and forecasting cycle, drive management reporting, perform analytical work that supports major business decisions, from annual budgets through to M&A integration. 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.

The Financial Modelling Analyst is a specialist role within the FP&A team, focused on developing and owning sophisticated financial models that underpin Craigs' long-range planning and strategic decision-making. Based at Head Office in Tauranga (or Auckland), this role offers a rare blend of modelling depth and strategic visibility, working closely with the Head of FP&A, the Strategy team, and senior leadership to build and maintain models that directly inform how Craigs grows and evolves.

WHAT I DO

FINANCIAL PLANS

- Ownership of the 5 Year Forecast Model to ensure it remains robust, well-governed, and aligned to the annual strategic planning cycle. Partner with the Strategy team and senior leadership to capture key themes, translate them into financial drivers and scenarios, and integrate these into the 5 Year forecast. Ensure inputs are accurate and assumptions well grounded through appropriate challenge and judgement.
- Coordinate inputs to the 5 Year Forecast leveraging the Workday Adaptive Planning system, this will include ongoing development and improvements to the long-term planning model.
- Assistance in preparation of annual operating and capital budgets and rolling forecasts where required.

MODELLING AND FINANCIAL ANALYSIS

- Creation of sophisticated financial models to provide projections and scenario outputs supporting strategic decisions, business performance, and growth opportunities e.g. pricing analysis, commission initiatives, profitability optimisation.
- Provide support for M&A activity including financial modelling inputs to support deal evaluation, scenario analysis. This includes reporting of performance against investment business cases post-acquisition and calculation of historic pro forma results to support regular reporting to CIP's Private Equity owners.
- Maintain and continuously improve the integrity, structure, and documentation of all BAU models, ensuring they are auditable, scalable, and fit for executive-level use.
- Contribute to ad-hoc modelling and financial analysis as requested by the CFO, Head of FP&A, and senior leadership — bringing structure and insight to complex, ambiguous problems.

PROJECTS AND PROCESS IMPROVEMENT

- Contribute to projects or continuous improvement initiatives within the FP&A or wider finance team.
- The role offers scope to deepen modelling expertise while expanding strategic influence across major initiatives as Craigs continues to grow.

GENERAL DUTIES AND RESPONSIBILITIES

- Operate within the parameters of the NZX rules and regulations, relevant legislation and CIP procedures and policies.
- Maintain a high level of competence with CIP systems.
- Follow company policy and process to ensure client information is protected against loss, unauthorised access, use, modification of disclosure.
- Demonstrate the Craigs' values every day and encourage, support and enable my colleagues to do so also.
- Maintain the core competencies as set down by the Company from time to time.
- Complete all Company educational requirements as required for the role as set by the Company.
- At all times follow Company prescribed administrative processes and policies, including use of supporting systems.
- Act professionally, ethically and work co-operatively and constructively within the framework of the Company structure.
- At all times act with integrity and treat clients fairly and respectfully.
- Any other tasks as requested by your manager.

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.

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

ESSENTIAL:

- Tertiary qualification in finance, accounting, economics, or a related business discipline.
- Minimum of five years' experience in a commercial finance, corporate finance, or FP&A role, with a focus on financial modelling.
- Advanced Microsoft Excel skills with a strong emphasis on financial modelling, including scenarios, sensitivity analysis, and clean, auditable model architecture.
- Excellent time management and organizational skills.
- High level of accuracy and attention to detail.
- Strong analytical and problem-solving capability, with the ability to work through complexity and ambiguity and translate model outputs into clear, commercially meaningful insights.
- Strong stakeholder engagement skills, with the confidence to work directly with senior leaders and across teams to gather inputs, validate assumptions, and present findings and information clearly to senior stakeholders.
- Self-starter who takes ownership of their work, shows initiative, and thrives in a dynamic environment where priorities can shift.

DESIRABLE:

- Chartered Accountant (CA) membership with CAANZ, or equivalent professional qualification.
- Experience in a specialist Valuations, M&A, or Corporate Finance team at a NZ Big Four or investment bank.
- Experience in financial services or wealth management
- Experience working in a fast-paced, change-driven environment (e.g., M&A, business transformation)