

APPENDIX ONE:
Position Description



POSITION TITLE:	Marketing and Digital Assistant
LOCATION:	Head Office, Tauranga
REPORTS TO:	Head of Marketing and Communications
TEAM:	Marketing and Communications

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 purpose of the Marketing and Communications team is to develop the firms external and internal brand, marketing, and communications strategy in line with the strategic ambition of the Craigs business. Delivering successful events are a critical part of delivering exceptional customer experiences and supporting key business objectives.

Reporting to the Head of Marketing and Communications, the Marketing and Digital Assistant works closely with the marketing team to support the coordination and delivery of Craigs Investment Partners (CIP) marketing strategies. This is a hands-on, operational role that contributes to marketing activity across digital, brand, branch and communications channels. The role supports the implementation of marketing initiatives, manages day-to-day processes, and helps ensure consistent, high-quality execution of campaigns and collateral. It offers an excellent opportunity for someone looking to develop their marketing career in a dynamic and collaborative environment.

WHAT I DO

- Working with the Digital, Brand and Branch leads for the implementation of marketing campaigns, including content creation, scheduling, and distribution across digital and traditional channels.
- Management of all marketing business collateral requirements including communicating deadlines for change updates, archiving, branch brochure custodian liaison, print house management and distribution of all brochures and print material as required
- Development and distribution of corporate collateral in line with brand guidelines; company cards, calendars, stationary, Templates (Memo, Letterheads).
- Liaison with Investment Advisers, product managers and other departments to ensure the timely implementation of agreed projects or timelines as required.
- Co-ordination of marketing project timelines and task management such as shared folders, intranet documents and updating information including: truth stats, daily tasks including: FIDaily, CCM Rate sheet etc
- Support the creation and distribution of email marketing campaigns, newsletters, and promotional materials.
- Coordinate the marketing-based subscriptions and payment and credit card reconciliations for the marketing team

ADMINISTRATIVE SUPPORT

- Work with the marketing team for management of all marketing business collateral stock requirements including communicating deadlines for change updates, archiving, branch brochure custodian liaison, print house stock management and distribution of all brochures and print material as required.
- Lead, with support from others for the development and distribution of corporate collateral and internal communications and programmes in line with brand guidelines; company cards, calendars, stationary, Templates (Memo, Letterheads). All the while looking for ways to optimise processes and ways of working for the benefit of self and others
- Provide administrative support to the marketing team, including scheduling meetings, preparing reports, and organizing marketing materials as required.
- Work with marketing team for maintenance of the Marketing register of subscriptions and renewals
- Stay up to date with the latest marketing trends, technologies, and best practices to contribute fresh ideas to the team and grow own knowledge.

WEB, DIGITAL CONTENT AND ADVERTISING

- Supports CIP's digital and social media presence in partnership with brand, branch, client and digital leads
- Contributes to the delivery of paid and organic digital campaigns across Craigs' owned channels, ensuring alignment across social, web and intranet
- Works with external media agencies to support campaign execution, optimisation and budget management
- Ensures digital activity aligns with brand, audience and compliance requirements, with performance tracking and insights provided
- Supports the development and distribution of key digital content, including e-newsletters and campaign assets, in collaboration with internal stakeholders
- Provides digital and advertising support for branch and adviser activity, with reporting to inform continuous improvement

BRANCH SUPPORT AND EVENT CO-ORDINATION

- Provide support to branch advisers working with the digital leads for development of digital content/ banners etc utilising CANVA and other mediums. Specifically lead the process for event invites for non-flagship events and non-sponsorship-based events process
- Be the champion for the execution of marketing activities on EVENTRBRITE with support of the Branch focussed team and work with others to identify ways to improve, optimise and engage with the use of EVENTBRITE
- Aid in the planning and execution of events, trade shows, and promotional activities.
- Assist with logistics, promotional materials, and on-site coordination as needed.
- Development and maintenance of all signage, including new branch signage, branch advertising, and sponsorship billboards as required
- Assist with timely implementation of CIP events, both national and large branch events. Including the development and maintenance of all marquees, banners and signage suitable for hosting events.

ANNUAL CORPORATE PROGRAMMES, EVENTS AND COLLATERAL

- End-to-end ownership of key annual corporate programmes and collateral, including company-wide calendars and seasonal initiatives

- Leadership of large-scale internal and external programmes (e.g. 50km a Day), coordinating multi-channel delivery across 22+ branches and external platforms
- Central point of coordination for programme communications, stakeholder engagement, and nationwide rollout
- Management of sponsorship and event activations (e.g. NZ Open), supporting on-site delivery, branded experiences, and content capture
- Ensures brand-aligned, high-quality execution through strong planning, partner collaboration, and post-programme review

GENERAL DUTIES AND RESPONSIBILITIES

- Working within approved budgets.
- Provide support for CIP BAU communication tasks and flows that require a 'team' approach for delivery based on capacity as required
- Operate within the parameters of the NZX rules and regulations, relevant legislation and CIP procedures and policies.
- Maintain a high level of competence with Craigs Investment Partners' systems.
- Follow company policy and process to ensure client information is protected against loss, unauthorised access, use, modification or disclosure.
- 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.



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 degree in communications, journalism, marketing or business discipline or related field (or equivalent experience).
- At least 2-3 years of experience working inside a marketing team/ function
- Experience with social channel marketing – content creation and/or social channel management
- Strong passion for marketing with a desire to learn and grow in the field.
- Excellent written and verbal communication skills.
- Understanding of marketing principles and concepts.
- Familiarity with social media platforms and digital marketing tools is a plus.
- Attention to detail and ability to multitask in a fast-paced environment.
- Creative mindset and willingness to contribute innovative ideas.
- Strong organizational and time management skills.
- Ability to work collaboratively within a team and take direction from senior team members.
- Attention to detail and Proofreading skills are essential.
- Attention to detail and ability to manage multiple tasks and deadlines.
- A self-starter with the ability to show initiative and a valued team player is essential.
- Understanding and/ or familiarity with project management and coordination.
- Ability to adapt to changing priorities and work independently or as part of a team.
- Strong computer skills – MS Office; Word, Excel, PowerPoint, Outlook.
- Experience using CM systems on websites – HTML coding is advantageous.
- Financial Markets background or interest is a strong asset.