

**APPENDIX ONE:**  
Position Description



POSITION TITLE:	Financial Accountant
LOCATION:	Tauranga
REPORTS TO:	Financial Controller
TEAM:	Finance, Head Office

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.

As the Financial Accountant I am responsible for the preparation of timely and accurate internal and external financial statements for the wider Craigs Investment Partners group and associated companies.

Other critical elements of the position include ensuring the taxation obligations of the relevant companies are managed to a high level, providing assistance with preparation of the annual operating budgets and liaison with external auditors.

## WHAT I DO

### Key responsibilities

- Timely and accurate preparation and distribution of monthly, quarterly and annual financial statements and reports for subsidiary and associated entities of Craigs Investment Partners Limited
- Financial statements that comply with applicable standards, trust deeds and statutory regulations
- Preparation and filing of company taxation obligations
- Assistance in preparation of annual operating and capital budgets
- Liaison with external audit staff
- Monthly reconciliation of all key general ledger accounts
- A focus on process and continuous improvement
- Contributing to the development of accounting policies, systems and procedures
- Preparation and further development of ad hoc and structured reporting to the business as required
- Involvement in projects as and when required

## WHAT I VALUE

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### Our Values



We are stronger together



We strive for excellence



We put people first



We do what's right

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

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- Tertiary qualification in a finance or business-related discipline
- Chartered Accountant (CA) membership with CAANZ
- Previous experience in a similar position (desirable)
- Previous experience in a financial services business
- Strong financial accounting and analysis skills
- Excellent time management and organisational skills
- Ability to communicate with staff at all levels of the organisation
- High level of accuracy and attention to detail
- Proficient Microsoft Excel user
- Self-starter with the ability to show initiative