

APPENDIX ONE:
Position Description



POSITION TITLE:	Senior Strategy Analyst
LOCATION:	Auckland
PEOPLE LEADER:	Head of Strategy
TEAM:	Strategy

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.

Our Strategy team are responsible for developing and implementing the Craigs business strategy and working with the Executive team to ensure this is operationalised across all areas of the business. A key aspect of the role will include supporting Craigs' growth strategy via Mergers and Acquisitions (M&A).

As a Senior Strategy Analyst, I support the development, implementation and reporting on the Craigs business strategy, and provide the Board and Executive team with commercial insight into current and future performance to guide decision making within CIP. Reporting to the Head of Strategy, I also support the wider Executive team including the Chief Financial Officer and Head of Private Wealth and Markets.

WHAT I DO

- Manage M&A processes and execute transactions (from term sheet negotiation through to completion and integration), delivering high-quality valuation, strategic, and financial advisory solutions
- Work as part of larger project teams and manage projects through to successful conclusion (including integration of acquired businesses)
- Engage with stakeholders and drive a highly collaborative approach to project delivery
- Analyse market dynamics, market share changes, product performance, and competitive intelligence
- Business case preparation to support strategic direction and initiatives
- Provide financial analysis to address Board and Executive team information requests
- Demonstrate the Craigs' values every day and encourage, support and enable my colleagues to do so also

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

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

- Qualification
 - Relevant degree level tertiary qualification, preferably post-graduate, in an applicable area
- Knowledge and Experience
 - 5+ years' experience in strategy consulting, investment banking, or a strategy role at large corporate preferred
 - Proven M&A experience
 - Reasonable level of industry knowledge in financial services
 - Experience working across multiple projects
- Skills and Attributes
 - Strong analytical and problem-solving skills
 - Excellent communication and relationship building skills
 - Strong investigative and problem-solving skills
 - Strong analytical, Excel, financial modelling skills with well-developed commercial acumen
 - Experience working across multiple projects, and is organised and proactive
 - Driven with desire to make a difference and build your career