

APPENDIX ONE:
Job Description



POSITION TITLE:	Private Wealth Business Data Analyst
LOCATION:	Auckland
REPORTS TO:	Head of Advisory

POSITION SUMMARY

As a Private Wealth Business Data Analyst, you will work closely with the Head of Advisory and Area Managers to:

- Develop live Management Information Systems by mapping out existing internal data streams and building queries that align with the current business reporting frameworks
- Working in large inter-departmental projects as an analytical expert, championing and representing Private Wealth Advisory
- Proactively identify better ways to report management information.

Key regular tasks include management of monthly Adviser scorecard reports, supporting the Chair of the Adviser Panel with analysis and proposal presentation, preparation of data for board papers/reports, development of MIS and adhoc data analysis and reporting.

The Private Wealth Business Data Analyst will work cooperatively and constructively within the framework of the firm, reporting to the Head of Advisory.

KEY RESPONSIBILITIES

PRIVATE WEALTH REPORTING

- Develop Private Wealth MIS (Management Information Systems) to measure business development, client base opportunity and risk, and other key areas of the Private Wealth business
- Production, development, management and ongoing enhancements to Adviser scorecard, Branch scorecard and Assistants scorecard
- Perform analysis and provide data with regard to Private Wealth performance for Board reports
- Provide data analysis and documentation for Adviser Panel meetings
- Perform adhoc data analysis and reporting

MANAGEMENT AND DEVELOPMENT OF OPERATING MODELS

- Management of new issue allocation models
- Mapping of internal data sources to develop direct data feeds into live management reporting
- Working with internal departments to create data queries and produce insights
- Work collaboratively with IT and Private Wealth Advisory to build better reporting solutions

PRIVATE WEALTH STRATEGY

- Lead and contribute to projects related to the CIP 2025 strategy for Private Wealth as required by the Head of Advisory
- Work collaboratively with the Enterprise Project Management Office to achieve successful project and business change outcomes
- Participate in preparing business cases for reporting and data analysis solutions
- Participate in project budget setting and cost/benefit analysis
- Participate in projects as a technical expert as required
- Review and contribute to project documentation such as requests for proposals (RFPs), business cases and requirement documents as required
- Review and report on the success of projects versus CIP strategic objectives

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.
- Complete all Company educational requirements as required for the role as set by the Company.
- Act professionally, ethically and work co-operatively and constructively within the framework of company and branch structure.
- Any other tasks as requested by your manager.

PERSON SPECIFICATION

Qualifications	<ul style="list-style-type: none"> • Degree qualified in a relevant field such as Finance or Commerce
Knowledge/Experience	<ul style="list-style-type: none"> • Very strong SQL & Excel skills • Experience building Power BI dashboards 2+ years • Minimum 2 years' experience in data analytics and reporting • Financial analysis and planning experience • Financial services industry experience 1+ years • Project experience from a business perspective
Key Skills and Attributes	<ul style="list-style-type: none"> • Excellent time management and organisational skills • Excellent communication skills (both written and verbal), with the ability to communicate effectively at all levels in the business • Able to work well under pressure • Has a collaborative approach to working with a range of stakeholders • Engenders a strong delivery focus across the Private Wealth network • Meets tight schedules and cost targets without compromising business requirements • Commercial / business acumen • Problem solving skills • Effective influencing and relationship management skills • A proven ability to plan and prioritise a program of work, to deliver results