



Head of Growth & Strategic Partnerships, ANZ & Asia Pacific

Candidate Pack

Welcome

Dear Applicant

Thank you for your interest in joining the Chartered Institute for Securities & Investment (CISI) as Head of Growth and Strategic Partnerships for ANZ and Asia Pacific.

Following our recent strategic alliance with FINSIA, we're establishing CISI's presence in Australia and New Zealand. By November 2025, we will welcome around 7,000 new members across both countries. While all new members are important, what excites us most is the opportunity to build something even bigger, with this new base in Australia and New Zealand serving as our foundation for broader Asia-Pacific expansion.

As our Head of Growth & Strategic Partnerships for ANZ & Asia Pacific, you'll shape how professional excellence is defined and delivered across Australasia and influence our strategy for the wider Asia-Pacific region. You won't be building this alone, you'll have the full support of our global operations teams in London and Sri Lanka, who provide world-class infrastructure, technology, and operational expertise. What you'll bring is the local leadership, strategic vision, and market relationships that will make the difference.

What You'll Achieve:

- Establish our new Sydney presence and lead our ANZ strategy while contributing to APAC planning
- Guide the transitioning former FINSIA members across Australia and New Zealand through a seamless experience
- Build partnerships with regulators, industry leaders, and institutions across both countries
- Deliver a high-quality member experience for financial services professionals throughout the region
- Shape our expansion strategy for the broader Asia-Pacific market

We are looking forward to receiving a diverse range of applications from individuals who have accomplished a career that reflects demonstrable interest in financial services and appreciates the importance of raising standards globally and in Australasia, now and in the future.

You may come from an organisation within financial services, or from professional services or regulation but must have credibility and understanding to engage with senior financial services professionals. Wherever you are, you will possess drive and energy along with a real passion for getting things done. Your superb strategic influencing skills, strong interpersonal abilities and reputation for making it happen will mean you are our go-to person for Australasia.

At CISI we must stay ahead of the curve in a rapidly evolving professional and industry context. This role presents an unrivalled opportunity for a dynamic, ambitious professional to cultivate and leverage the high-quality alliances and trust we need in a modern and rapidly changing world and to underpin CISI's growth.

We look forward to receiving your application.



Tracy Vegro
Chief Executive Officer

About the Chartered Institute for Securities & Investment

The Chartered Institute for Securities & Investment is the leading professional body for securities, investment, wealth, and financial planning professionals. Dedicated to professionalism since it emerged from the London Stock exchange in 1992, its purpose is to champion lifelong learning and integrity, raising individual standards of knowledge, skills and behaviour globally to enhance public trust and confidence in financial services.

We exist to set standards of professional excellence and integrity for securities, investment, wealth and financial planning professionals, providing qualifications and promoting the highest level of competence to our members, individuals and firms.

Our Global Infrastructure

With headquarters in London and a significant operations centre in Sri Lanka, CISI operates a truly global platform. This means you'll have access to:

- Proven systems and processes refined over three decades
- Technical teams supporting our digital platforms and member services
- Content specialists developing world-class qualifications and CPD programs
- Operational support handling the complex backend while you focus on growth

Why Australia, New Zealand, and Asia-Pacific Matter

These markets represent some of the most sophisticated and forward-thinking in financial services. With strong regulatory frameworks, innovative financial institutions, and a growing focus on professional standards, both Australia and New Zealand are natural homes for CISI's mission and together they form the ideal launching point for our Asia-Pacific growth strategy.

Our alliance with FINSIA creates the perfect foundation across both countries. Now we need the right leader to build upon it, someone who understands the distinct yet connected markets of Australia and New Zealand, appreciates our global operational capabilities, and can leverage these to create something exceptional while keeping an eye toward the broader APAC opportunity.

Find out more

Please visit <https://www.cisi.org>



Role Description

Job title

Head of Growth & Strategic Partnerships, ANZ & Asia Pacific

Reports to

David Hare, AD, Strategic Partnerships & Membership Engagement

Direct reports

Initially a small team of people which are also being recruited. We hope that the successful candidate will be able to engage in the process to support the selection of the final candidates.

Role purpose

As a key member of the senior leadership team within CISI, this is an exciting opportunity to be part of fast-growing global organisation.

The role will be pivotal in shaping our growth and member retention in Australasia. It requires a commercial mindset, ability to think about opportunities across the breadth of the organisation and exceptional customer engagement skills. A proven track record of delivering tangible results is essential.

Key Responsibilities

Your First Year

Foundation Building

- Welcome and support transitioning former FINSIA members across both Australia and New Zealand with excellence
- Build a talented, motivated local team who share our values
- Leverage global operational support from London and Sri Lanka to establish seamless service delivery
- Establish CISI's presence through strategic events and engagement across ANZ
- Create advisory structures that give us genuine market insight from both countries
- Begin scoping opportunities and partnerships across key APAC markets

Looking Ahead - Sustainable Growth

- Expand our membership through organic growth and strategic partnerships across Australia and New Zealand
- Position our qualifications as the professional standard of choice
- Develop diverse revenue streams that serve member and organizational needs
- Influence the conversation on professional standards and industry development in both markets
- Contribute strategic insights to shape our APAC expansion roadmap
- Work seamlessly with global teams to deliver exceptional member experiences
- Lead CISI's strategic and operational activities across the Australia and New Zealand Region

Skills and Knowledge

- Strong leadership, relationship management and influencing skills.
- Strategic thinker with operational delivery capability.
- Excellent written and verbal communication skills, with the ability to represent CISI confidently to senior external stakeholders within financial services and government.
- Understanding of regulatory and professional development frameworks within financial services in the region.
- Knowledge of membership or chartered bodies, including member engagement and governance structures.
- Financial acumen and experience managing customers, budgets, people, and partnerships.

Experience

- Significant experience in a leadership role within the financial services sector (critical)
- Proven track record of public speaking and representing an organisation externally and building senior-level partnerships.
- Demonstrated experience managing teams and leading cross-functional initiatives in a regional or international context.
- Demonstrated experience of delivering business growth and working in a commercial environment

Terms of Appointment

Remuneration

This role offers a competitive remuneration package, which includes a basic starting salary of up to AUD \$170,000 per annum. In addition, benefits offered by CISI include:

- 12% Superannuation guarantee
- Business travel expenses covered
- Discretionary bonus paid annually
- Complimentary CISI Membership
- Private Medical Insurance

Location

This role is based in Sydney, Australia and the post holder will be working remotely.

Annual leave

25 days leave per annum plus national and additional state holidays, plus three days off between Christmas and New Year.

Candidate Adjustments

At CISI we encourage applications from a neurodiverse workforce so please reach out to discuss reasonable adjustments if required.

We value the contribution that employees with different views and experience bring to the Institute and are committed to promoting equality, inclusion and diversity. We hope to receive applications from a wide range of talented people irrespective of their race, religion or belief, gender, age, gender identity, neurodiversity, disability, sexual orientation, ethnic origin, political belief/opinion, social class, relationship status or caring responsibilities.

How to apply

To make an application, please email your CV and supporting statement that sets out why you think this role is the right move for you and how you meet the knowledge and experience criteria to HR@cisi.org.

Alternatively apply directly on LinkedIn, Seek.au, or Associations Forum.

Recruitment Timescales

Closing date:	1 st October 2025
Preliminary interviews:	Week Commencing 13 th October 2025
Final Panel interviews:	Week Commencing 27 th October 2025

