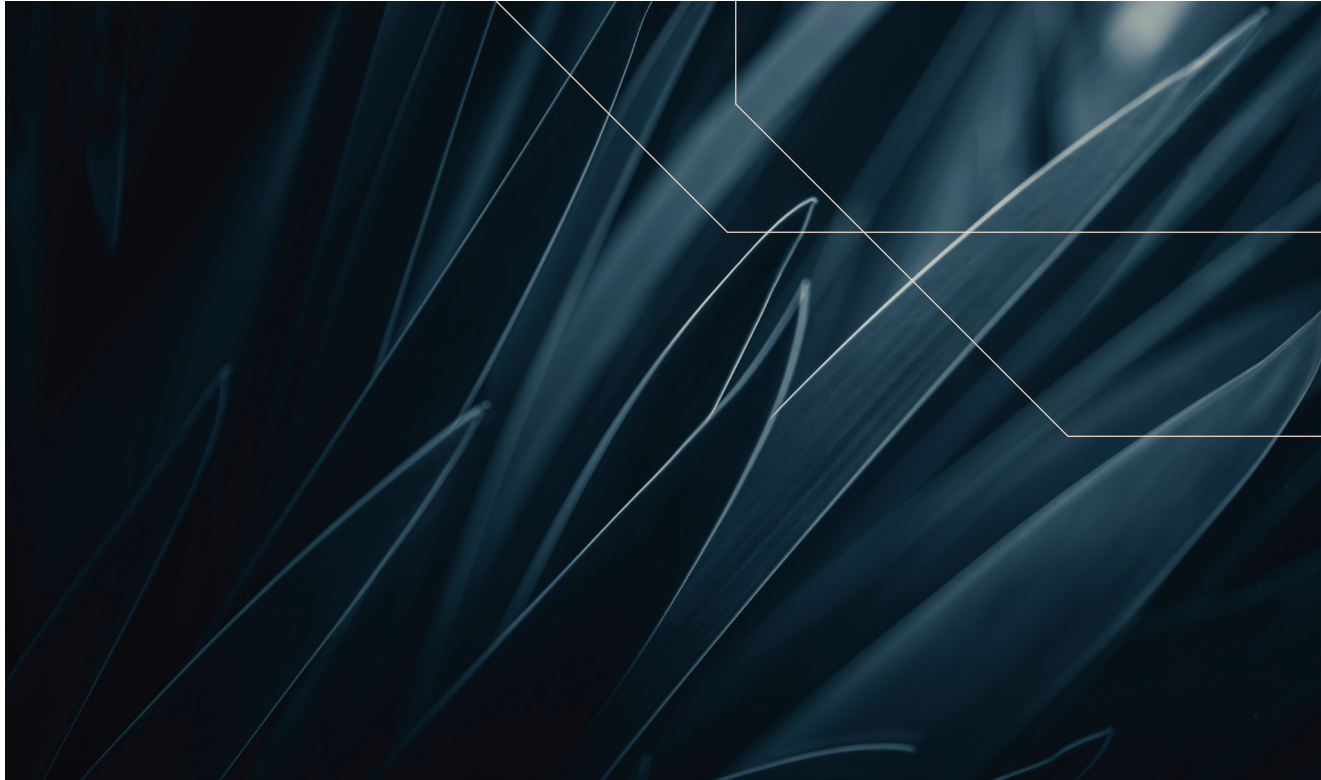


February 2025

Graduate Programme Forsyth Barr



Build your career with Forsyth Barr. Our graduate programme will challenge, reward and kick-start your career – at a leading and highly reputable NZ-owned investment firm. Successful candidates should expect broad investment-related exposure, including hands-on projects, which will test and develop a wide range of skills foundational to a career in financial markets. This will be supported by direct feedback and the opportunity to broaden your professional network.

You'll have the opportunity to work across a range of Forsyth Barr's divisions - providing you a unique perspective into how the business operates, the ability to build relationships across the firm, gain insight into a wide range of career options and help you to refine your strengths and interests. Overall, you will be provided with a breadth of exposure to the investment industry unrivalled within the New Zealand market.

The programme offers you the chance to learn from, and work alongside, talented and experienced professionals with a wealth of knowledge you can tap into. The relationships you make, and the impression you leave, could also help you secure a permanent position after you complete the programme.



Rotations

You'll have the opportunity to get broad exposure to the Forsyth Barr business including:

EQUITY RESEARCH

Contribute to our top-ranked research team. There is never a dull day learning about a company, its competitors and wider industry; interacting with company management and seeing operations first-hand; and distilling this into a view to communicate to clients and broader stakeholders.

INSTITUTIONAL SALES AND TRADING

Get amongst the 'action'. Watch live orders being placed in the market and learn how trades become reality—from the very small through to large block trades.

RETAIL ADVISORY

Watch first-hand how client portfolios are managed as our advisers work to meet each client's objectives and build wealth. You'll also see the depth of relationships which underpin our large wealth management business.

INVESTMENT BANKING

Be part of a team supporting and advising a broad array of listed and unlisted corporates. This can range from mergers & acquisitions, new listings, capital allocation, funding and other key strategic decision making.

ESG (ENVIRONMENTAL, SOCIAL, GOVERNANCE)

Learn about how ESG issues intersect with investments, understand how clients are considering ESG in their portfolios and help the team assess how New Zealand companies are transitioning to a more sustainable way of operating. Every day is different in this rapidly evolving space.

FUNDS MANAGEMENT

Learn about portfolio management processes with our award winning funds management team, Octagon, as they manage various funds across New Zealand, Australia and International equities as well as the fixed income universe.

OTHER RELEVANT ROTATIONS, LIKELY DEPENDENT ON YOUR INTERESTS / SKILLS.

Ranging from Finance and Administration functions, Compliance, Innovation, Marketing etc.

Learning & Development

- Undertaking the CFA programme is highly encouraged alongside your work (with exam costs covered). We also provide paid study leave for CFA exams (5 days).
- Tailored in-house training and the potential for external training as/where relevant.
- Mentor within each new team you work within. This includes regular catch-ups to check in and support you.

Key skills you will bring

- You will have completed or are near completing a tertiary qualification in finance, economics, accounting, business, engineering, computer science, mathematics or a comparable qualification
- Well-rounded, with a very strong academic record
- Interest in capital markets, the stock market and financial & industry trends
- Hunger to learn, with a curious and open mind
- Not afraid to contribute, share your opinion or challenge the status quo
- Strong relationship and networking skills
- Professional, positive attitude and a friendly demeanour
- Good verbal and written communication skills coupled with an ability to self-motivate, prioritise and manage your time

Key details

- **Eligibility:** New Zealand resident. You can apply to join the Graduate Programme when you're in the final year of your degree or within 12 months of your graduation date at the time of application.
- **Location:** Auckland
- **Duration:** Fixed term, 15 months
- **Application dates:** Applications open early 2025.
- **Commencement date:** Early 2026