



Position description:

Chief Financial Officer

About the Wise Group

The Wise Group is a Peak Performing organisation. Peak Performance is about enabling individuals and organisations to continuously exceed their best in the pursuit of an inspiring purpose. It's a journey not a destination and it's about becoming the best we can be. Every day we can all do just a little bit better.

The Wise Group is a family of charitable organisations and is one of the largest providers in the New Zealand mental health and addiction sector. The Group's work spans health and wellbeing services, employment and navigation services, education and training, workforce development and research, information services and software development, philanthropy and finally business support services. Being one of the largest providers isn't what matters to us – making a difference does. Our size simply means we have significant ability to efficiently and effectively establish new services, transform existing services and give assurances to any funder that we can manage risk in changing environments.

The one thing that has never changed from when we were a tiny provider with just one paid staff member to the present day is our deep belief in citizenship, in social justice, in people deserving a deeply personalised service and in our team creating connections to support people to find and live their dreams. That's what matters to us. Working collaboratively means the organisations in the Wise Group are able to share knowledge, expertise and resources to create fresh possibilities and services for the wellbeing of people, organisations, communities and the environment.

Position Purpose

To provide inspirational and world leading financial leadership to the Wise Trust Board, subsidiary companies, Chief Executives and their leadership teams and to support the achievement of the Group's purpose. This will be supported by sustainable and leading-edge financial systems, processes and controls that meet statutory responsibilities as well as information and analysis requirements.

Reporting Structure

The Wise Group has a unique structure to support the Group to deliver on its purpose. As a key member of the Wise Management Services leadership team the CFO is also required to report to and maintain relationships with:

- Chief Operating Officer Wise Management Services – in relation to the day-to-day operation of the Finance team. Approval of all matters relating to employment such as annual leave, training and expenses.
- Wise Group Chief Executive – for Strategic Financial discussions.
- Finance, Audit and Investment Committee – Chair of Finance Committee and members for monitoring of Group Finances, practice and delivery and strategic financial discussion.

- Subsidiary Boards and committees. In attendance as required or invited for specific discussions including but not limited to:
 - Wise Trust Board (ultimate Group parent entity)
 - Risk Committee (of Wise Trust Board)
 - Remuneration Committee (of Wise Trust Board)
 - Service facing Boards
 - Workforce Boards
 - Chief Executive Forum

Key responsibilities

Inspirational leadership

Demonstrate inspirational leadership in action utilising Peak Performance leadership principles to create a world-class finance team.

Exceptional financial advice and support

Exceptional strategic financial and commercial advice is provided to Chief Executives, Trust Board, and directors and the Wise Management Services leadership team to enable the best decisions to be made in relation to the Group's activities. Capital investment proposals and sustainable business cases are prepared, evaluated and managed through to recommendation and approval. Provide direction and leadership in the Finance, Audit and Investment, and Risk Committees.

Focus on financial sustainability

Annual budget setting is embarked upon to ensure that financial requirements meet our challenges and purpose. Longer term forecasting is also utilised to ensure we are being most efficient and effective in delivering on our purpose over the medium and longer terms.

Statutory obligations and responsibilities

Provide exceptional advice and support, in conjunction with others as appropriate, to ensure statutory financial and compliance responsibilities under relevant legislation are met.

Financial systems and processes

Wise finance's operational delivery is underpinned by best practice financial policies, systems and processes that allow us to most effectively and efficiently deliver on the Wise Group purpose.

Mergers and Acquisitions (M&A)

Lead financial due diligence efforts for potential mergers, acquisitions, or partnerships. Provide financial expertise during negotiation and integration phases.

Make work a source of wellbeing

Treat everyone in our workplace fairly, equally and with respect. Actively seek out, draw upon and value the different knowledge, perspectives, experiences and styles present in our workplace.

About you

Your knowledge and skills

- Excellent leadership skills, with steadfast resolve and personal integrity
- Exceptional verbal, written, and visual communication skills
- Understanding of advanced accounting, regulatory and compliance issues, and tax planning
- Chartered Accountant
- Executive experience with SaaS business models and their associated revenue recognition
- Ability to work successfully with Māori as tangata whenua and diverse cultures and groups of people
- Experience in mergers and acquisitions and investor relations is an advantage
- Preferred knowledge and experience working in the New Zealand health sector and non-government and community sector is an advantage

Your qualifications

- Master's degree (or equivalent experience) in accounting, business accounting, or finance

Your experience

- Five or more years' experience in a CFO or senior financial leadership role.