



Manager - Events and Customer Support

ANZ & Asia Pacific

Candidate Pack

Welcome

Dear Applicant

Thank you for your interest in joining the Chartered Institute for Securities & Investment (CISI) as for Manager - Events and Customer Support, ANZ & Asia Pacific. There are two posts for this role: one based in Sydney and the other one in Melbourne.

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 Manager - Events and Customer Support for ANZ & Asia Pacific you'll be responsible for developing and executing events programmes in the region. You will be part of team of five in the region working closely with the Head of Growth & Strategic Partnerships and the Senior Manager Membership Engagement and Advisory Councils.

Also, 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 Achieve:

As Manager - Events and Customer Support you will play a key role in delivering high-quality member experiences across Australia and New Zealand and broader Asia Pacific region. You will lead the planning and execution of regional CPD events, conferences, and networking activities, ensuring they reflect CISI's global standards and support professional development. Your frontline support to members and customers will help foster trust, engagement, and satisfaction.

Working closely with the Head of Growth & Strategic Partnerships and the Senior Manager - Membership Engagement and Advisory Councils, you will contribute to a seamless member journey by managing enquiries, coordinating logistics, and maintaining accurate records. Your efforts will directly support CISI's mission to promote integrity, lifelong learning, and professional excellence in financial services.

We are seeking proactive professionals with strong customer service and event management experience, ideally within financial services or a professional membership organisation. Your ability to manage multiple tasks, engage with diverse stakeholders, and deliver service excellence will be central to building CISI's presence and reputation in the region.

This is a unique opportunity to help shape CISI's member engagement in Australasia, contribute to a growing global network, and make a meaningful impact in a dynamic and evolving professional landscape.

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

Manager - Events and Customer Support, ANZ & Asia Pacific

Reports to

Head of Growth & Strategic Partnerships, ANZ & Asia Pacific

Role purpose

This role provides day-to-day support to CISI members and customers in Australia and New Zealand and leads on the successful delivery of regional CPD events, conferences, and networking activities. The postholder will work closely with the Country Head and Senior Manager - Membership Engagement and Advisory Councils to support member engagement, respond to enquiries, and help ensure the delivery of high-quality professional events aligned with CISI's global standards. Successful candidates will thrive in a small team environment, they must demonstrate a proactive mindset, a high level of capability, and willingness to take a hands-on approach to ensure responsibilities are fulfilled effectively.

Key Responsibilities

Main duties and objectives

- Provide frontline support to members and customers via phone, email, and other channels, responding to a range of enquiries about membership, CPD, and qualifications.
- Lead on delivery of local event logistics including venue coordination, speaker communication, registration, and materials preparation, attending events as required to ensure smooth delivery.
- Liaise with the Central Events Team in London to ensure consistency of event planning and delivery standards.
- Support data entry and record-keeping across relevant systems, ensuring accurate and timely updates.
- Help prepare event communications, joining instructions, and follow-up correspondence.
- Manage local inboxes and coordinate responses to member and partner queries.
- Assist with post-event administration including attendance tracking and feedback collation.
- Support the rest of the team in strengthening local stakeholder relationships and member engagement activities.
- Contribute to a high standard of customer experience and uphold CISI's values of professionalism and integrity.

Skills and Knowledge

- Strong customer service, administrative & project management skills, managing multiple tasks efficiently.
- Good written and verbal communication skills, with strong attention to detail.
- Confident using email, spreadsheets, and digital tools; experience with CRM systems is desirable.
- Ability to work both independently and collaboratively with remote teams.
- Organised and proactive with a commitment to service excellence.

Experience

- Relevant experience in customer service and administration.
- Good experience in organising and executing high quality professional or educational events.
- Experience dealing with a wide range of internal and external stakeholders.
- Comfortable working with office software and maintaining accurate records.

Other requirements:

- Candidates must have the legal right to work in Australia
- Candidates must be physically based in Australia

Terms of Appointment

Remuneration

This role offers a competitive remuneration package, which includes a basic starting salary of up to **AUD 80,000** 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

The job holder will be based either in Sydney or Melbourne, Australia and will be able to work remotely. There are two positions available.

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 (maximum two pages) to HR@cisi.org. Please quote the name of this job role in the subject line of your email and desired location (Sydney or Melbourne).

Alternatively, apply directly on LinkedIn.

Recruitment Timescales

Closing date:	Friday, 14 th November 2025
Preliminary interviews:	Week Commencing 24 th November 2025
Final Panel interviews:	Week Commencing 8 th December 2025

