



Senior Manager - Relationships

ANZ & Asia Pacific

Candidate Pack

Welcome

Dear Applicant

Thank you for your interest in joining the Chartered Institute for Securities & Investment (CISI) as a Senior Manager – Relationships for ANZ & 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 Senior Manager – Relationships for ANZ & Asia Pacific, you'll shape how professional excellence is defined and delivered and influence our business development strategy for the wider Asia-Pacific region. 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:

In this role, you'll lead CISI's growth across the region by building strong relationships with firms, training partners, and members. You'll drive uptake of CISI's qualifications and CPD offerings, deliver impactful outreach, and ensure high levels of engagement and retention. Your success will help establish CISI as the trusted professional body in the region and support its broader expansion across Asia-Pacific.

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.

Whether your background is in financial services, professional bodies, or regulatory organisations, you will bring the credibility and insight needed to engage confidently with senior industry stakeholders. You'll be driven, energetic, and passionate about delivering results. With strong relationship-building skills, strategic influence, and a proven ability to lead business development initiatives, you'll be the key figure driving CISI's growth and impact across 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

Senior Manager - Relationships, ANZ & Asia Pacific

Reports to

Head of Growth & Strategic Partnerships, ANZ & Asia Pacific

Role purpose

This is an exciting opportunity to be part of fast-growing global organisation as a key member of the Business Development Team within CISI. The Senior Manager – Relationships will be responsible for building and managing strong relationships with CISI's members, firms, and training partners across Australia, New Zealand & Asia Pacific. This business development role focuses on growing CISI's membership base and promoting CISI's qualifications and continuing professional development (CPD) offer.

The role will also provide key account management and member engagement activity to maximise retention and identification of opportunities to sell additional services. The postholder will collaborate closely with colleagues across the Membership, Learning, Events, and Marketing teams to ensure excellent service delivery and member engagement.

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

- Identify and develop new business opportunities to grow CISI membership and qualifications uptake across the region.
- Manage relationships with existing members, firms, training providers and other partners to support retention and satisfaction.
- Deliver presentations and webinars promoting CISI qualifications, CPD, and membership benefits to corporate audiences.
- Support the organisation and delivery of CPD events, professional forums, and local engagement activity.
- Develop and manage relationships with key partners in the region that support delivery of our strategic objectives.
- Maintain accurate records of interactions, opportunities, and outcomes using CRM and reporting tools.
- Work closely with the global Marketing and Membership teams to develop campaigns and materials tailored to local markets.
- Represent CISI at conferences, events, and other professional forums in the region.
- Collaborate with the regional Head of Growth and the wider team to align activity with strategic goals.
- Act as a brand ambassador for CISI, promoting professionalism and integrity across the sector.

Skills and Knowledge

- Strong interpersonal and stakeholder engagement skills.
- Commercial awareness with the ability to identify and act on new business opportunities.
- Confident public speaker and presenter to both large and small groups.
- Understanding of the financial services sector and professional qualifications landscape.
- Organised and self-motivated, with the ability to manage multiple projects and deadlines.

Experience

- Experience in a business development, client relationship, or account management role, ideally within financial services or a membership/professional body environment.
- Demonstrated success in growing partnerships and managing stakeholder networks.
- Experience delivering presentations and managing events or outreach activities.
- Familiarity with using CRM tools to track engagement and outcomes.

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 105,000** 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 preferred location for this role is Sydney, Australia but as the post holder will be working remotely, candidates based anywhere in Australia will be considered.

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.

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

