



Candidate Briefing Pack for Forsyth Barr

Opportunity: Branch Manager — Christchurch



The Opportunity

This leadership role offers a unique opportunity to make a lasting impact in Christchurch's financial services landscape. As Branch Manager, you'll be at the forefront of driving team success, fostering client trust, and contributing to Forsyth Barr's reputation for excellence. Beyond operational oversight, this position allows you to shape strategy, champion professional growth, and build meaningful connections within the local community. It's an ideal role for someone who thrives on collaboration, values ethical leadership, and is motivated by delivering exceptional outcomes for both clients and colleagues.

About Forsyth Barr

Forsyth Barr is a proudly New Zealand-owned investment and wealth advisory firm with a long-standing reputation for trusted advice and strong client relationships. With offices across the country, the organisation combines deep local connections with national capability, fostering a collaborative and professional environment where people are supported to grow, contribute, and deliver meaningful outcomes for clients and communities alike.

Forsyth Barr's mission and values

Forsyth Barr's mission is to help New Zealanders grow, manage, and protect their wealth through trusted, high-quality investment advice. The firm combines deep local relationships with expert research and independent thinking, aiming to deliver long-term outcomes that support clients, communities, and future generations.

Integrity & Trust

Integrity sits at the centre of Forsyth Barr's approach. The firm emphasises impartial advice, professional standards, and putting clients' interests first. Its long-standing reputation has been built on trusted relationships, ethical conduct, and a commitment to delivering advice clients can feel confident relying on

Collaboration & People Development

Forsyth Barr promotes a collaborative culture where people are encouraged to develop professionally and contribute meaningfully. The organisation values supportive leadership, continuous learning, flexibility, and inclusion, recognising that strong client outcomes are driven by capable, engaged teams working together across the business.

Community & Long-Term Relationships

Community connection and lasting relationships are central to Forsyth Barr's identity. Through its nationwide office network, the firm supports local organisations and builds enduring partnerships with clients, focusing on personal service, accessibility, and advice tailored to individual goals and long-term financial wellbeing.

Candidate Timeline + Additional Information

Robert—
—Walters



Employer Benefits (not limited to)

- Competitive remuneration – base salary and discretionary bonus
- Free base medical insurance through Unimed
- Ongoing professional development & training

Additional information

- [About Forsyth Barr](#)
- [Forsyth Barr's Team](#)

Follow the links to explore more about the organisation

Timeline

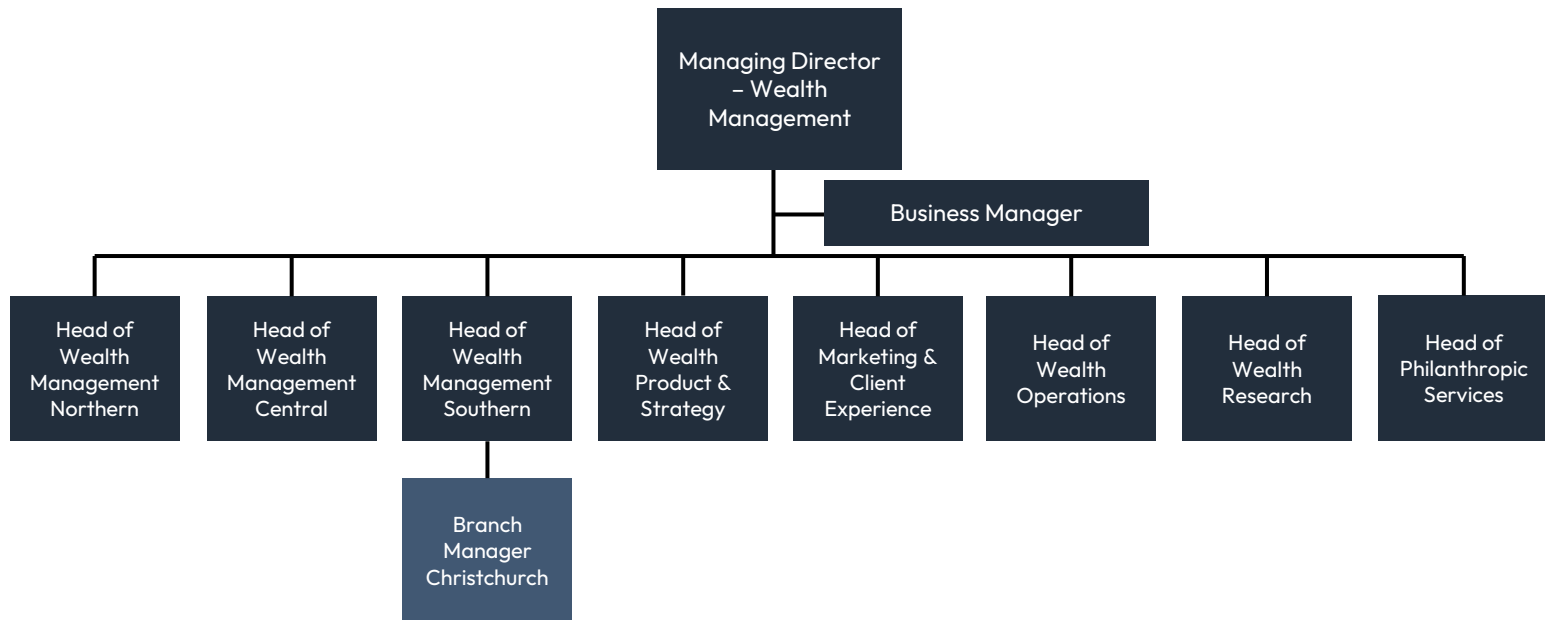
Please note that this timeline is a rough guideline and could change

| Stage | Activities | Timing |
|---|--|-------------------------------------|
| Applications close | Deadline for applications | Friday, 19th June |
| Interviews with Robert Walters | Screening and interviews conducted by Robert Walters to be completed | By Monday 22nd June |
| Shortlist | Shortlist presented by Robert Walters to Forsyth Barr | Tuesday 23rd June |
| First stage interviews with Forsyth Barr | Interview with hiring manager (Head of Wealth Management – Southern) for selected candidates | Friday 26th June |
| Second stage interviews with Forsyth Barr | Interview with Managing Director – Wealth Management for selected candidates | Week of 29th June |
| Psychometrics Assessments | Background checks and psychometric assessments as required | Thursday 2nd – Friday 3rd July |
| Meet key members of Christchurch team | Informal meet and greet coffee/drink with Christchurch team members | Friday 3rd July or week of 6th July |
| Due Diligence and Offer Negotiation | Final probity checks conducted. Offer negotiation completed | Week of 6th July |
| New position start date | TBC on notice period | TBC |

Organisational Chart

Robert—
—Walters

 FORSYTH BARR



Position Description

| | |
|--------------------|---|
| Job Title: | Branch Manager – Christchurch |
| Department: | Christchurch |
| Reports To: | Head of Wealth Management – Southern |

Position Purpose

The role is responsible for leading a high-performing advice business that delivers outstanding client outcomes and contributes strongly to the Southern Region's growth ambitions. The role has accountability for the performance, people, culture, client franchise and administration of the Christchurch branch, ensuring it is set up to capture the significant opportunity in this market.

Key Responsibilities

- Provide leadership and coaching to all the staff of the Branch:
 - Advisers and Associate Advisers
 - Adviser Assistants, ensuring they are well-equipped to support Advisers while optimising and simplifying their workflows.
 - Manage people issues and escalating when relevant.
- Lead the strategic vision, culture and growth of the Branch.
- Be the face of the branch to the community – networking and generating leads for the advisers.
- Lead recruitment, succession planning and talent.
- Responsible for improving productivity and profitability of the branch.
- Responsible for managing administration tasks of the branch, ensuring an error-free, accurate, and positive client experience.
- Responsible for marketing, events and communications for the branch.
- Engage with internal stakeholders to gather input and build alignment.
- Other Responsibilities
- Undertake other duties as may be required by the Employer from time to time.
- Observe proper ethical standards and act with honesty, integrity, fairness, due skill and care, diligence and efficiency and within your competence.

Skills and Abilities

- Professional, positive attitude with a friendly demeanour
- High EQ and influence
- Able to convert strategy into execution
- Strong understanding of financial services regulation
- Commercial and financial acumen
- Excellent interpersonal and written communication skills
- Excellent time management skills with the ability to remain calm and collected under pressure