



INFINZ MEMBERSHIP CATEGORIES & CRITERIA

CERTIFIED MEMBER – post nominal: INFINZ (Cert)

Certification acknowledges the skills and experience of the members concerned. Only Certified Members can vote at general meetings of INFINZ and be eligible to stand for the Board. Applicants for Certified Membership of INFINZ need to fulfil the criteria below and abide by the Code of Ethics and Standards of Professional Conduct.

Option A – Education and Experience

Education:

University degree, post graduate degree, or similar academic qualification as recognised by INFINZ, in a relevant discipline of; finance, accounting, economics, investment, corporate or securities law and trading, portfolio theory, finance-related roles and those working in the financial sector eco-system, corporate treasury management and financial risk management, and

Experience:

At least five (5) years direct experience or responsibility; in the securities industry which has entailed the use of analytical techniques, in wholesale financial or finance-related roles, or in funding, investment, foreign exchange, interest rate management, price risk management, cash management, **or**

At least five (5) years direct experience or responsibility in a position supporting activities in the financial sector eco-system as outlined above, including; legal advisers, academics teaching or studying relevant subjects at a tertiary level, policy analysts/regulators, investor relations professionals and those in treasury or capital markets related accounting/audit/tax/law.

And in each case engaged in such a position at the time of application for admission.

Option B – Long-standing Experience

Applicants who do not meet the education criteria outlined in Option A above, but whose chief occupation has been in or supporting finance-related roles as outlined above, for a period of ten (10) years or more and is engaged in such a position at the time of application for admission.

NON-CERTIFIED MEMBER - post nominal: INFINZ

Members are not Certified and are non-voting. Applicants can qualify by way of two options outlined below:

Option A

Applicants who have yet to qualify for Certified Membership based on either qualifications or experience, but who are working towards meeting the criteria

Option B

Applicants not eligible for Certified Membership who INFINZ considers have sufficient connection or involvement with the financial and capital markets in New Zealand.

Within the Membership category, young professionals under 30 years of age or emerging leaders under 35 years, and those retired or based offshore enjoy concessional membership rates.