



Job Description

Head of Investor Relations

The Head of Investor Relations is responsible for leading Summerset's engagement with the investment community and ensuring the market has a clear, accurate and compelling understanding of the Company's strategy, performance, growth opportunities and long-term value creation model.

Reporting directly to the Chief Financial Officer, the role serves as the primary architect of Summerset's investor relations strategy and acts as a trusted adviser to the Board, Chief Executive Officer, Executive Leadership Team and senior business leaders on investor sentiment, capital markets expectations and external perceptions of the Company.

The role combines relationship leadership with strong commercial and analytical capability. It is responsible for developing and maintaining high-quality relationships with investors, analysts, lenders, brokers and other market stakeholders, while also leading the preparation of market-facing communications, investor materials and disclosure narratives.

The Head of Investor Relations leads a small team, including an Investment & Strategy Analyst, and provides informal leadership across the broader Finance team and other functions to ensure Summerset presents a consistent, transparent and credible market narrative.

Business Unit: Corporate
Services

Reports To: CFO

Department/Team: Investor
Relations

Direct Reports: Yes

Budget: No

Our Culture, Our Values, and Our Shared Promise

At Summerset, it’s the passion and dedication of our people that bring our villages to life. Across all our roles, we work together as one team to create the best possible life for our residents. Our vibrant culture is grounded in our values and shaped by what our people have told us they value most about working here.

Our values: One Team + Strive to be the best + Strong enough to care = **Bringing the best of life.**
 B.I.I.G promises you can expect to receive in return for your hard work and commitment to Summerset:

BELONG You will belong to a supportive team dedicated to creating vibrant villages & communities.	IMPACT You will make a meaningful difference in the lives of our residents, giving them a fulfilling & comfortable future.
INCLUSION You will be valued for your unique skills, talents & background.	GROWTH You will join a leader in a growing industry. As we grow, you can grow with us.

Leadership Capabilities

Whether you’re leading yourself, leading a team, or leading the organisation, the Summerset Leadership Framework describes that behaviours that make us a high-performing and thriving organisation.

LEADING INCLUSION We lead with respect and kindness, support each other through challenges, and foster inclusive, trusting environments.	LEADING GROWTH We seek feedback to grow, own our career journeys, and embrace change as a catalyst for learning and improvement.
LEADING IMPACT We work with purpose, plan and collaborate to deliver, and continuously seek better ways to innovate and improve.	LEADING FOR SAFETY We strive to lead safe people, safe places and safe systems, to protect our people and contractors, our residents, and our visitors from harm.

Contributions and Key Responsibilities

These are the key activities you’ll be responsible for in this role.

Investor Relations Strategy - Develop and lead Summerset's investor relations strategy - Shape how Summerset communicates its investment proposition, strategy, growth outlook and performance to the market - Continuously assess whether investor communications are effectively supporting shareholder understanding and valuation - Maintain a deep understanding of investor expectations, market trends and sector developments - Actively identify opportunities to improve transparency, investor understanding and market confidence - Support the positioning of Summerset within the broader NZ and Australian investment community	Investor and Analyst Relationships - Build and maintain trusted relationships with existing and prospective investors, analysts, investment bankers, brokers and other market participants - Act as a key external representative of Summerset alongside the CEO, CFO and Deputy CFO - Coordinate and participate in investor meetings, roadshows, conferences and market engagement activities - Lead investor engagement planning and stakeholder mapping to support shareholder development objectives and deliver on the investor relations strategy - Provide timely and effective responses to investor and analyst enquiries
Market Communication & Financial Results	Market Insight and Intelligence

- Lead the development of:
 - Half-year and full-year results materials along with supporting documents such as Q&A packs, internal technical briefings, speeches, etc
 - Investor presentations
 - Capital market updates
 - Investor website content
- Continuously improve the quality and accessibility of investor information
- Build a strong relationship with the Head of Communications to ensure investor relations communications alignment with the broader Summerset's communications strategy and opportunities to attract new investors are utilised
- Ensure consistency between financial disclosures, investor messaging, and market expectations
- Ensure market disclosures are clear, balanced, accurate and accessible to existing and new investors

Disclosure & Governance

- Support compliance with continuous disclosure obligations
- Ensure accuracy and consistency of externally disclosed financial and non-financial information
- Maintain strong processes and controls around investor communications
- Work closely with Legal and Finance to ensure messaging aligns with regulatory requirements

- Develop a systematic approach to gathering and interpreting investor feedback
- Monitor market perceptions, analyst research, valuation trends and competitor positioning
- Provide regular insights to the CFO, Executive team and Board on:
 - Investor sentiment
 - Shareholder expectations
 - Analyst views
 - Market concerns
 - Relative valuation and positioning
 - Emerging risks and opportunities
- Help shape management responses to investor concerns and market developments
- Provide regular updates to the Board and Executive team on:
 - Share price movements
 - Consensus forecasts
 - Peer performance

Capital Management & Transaction Support

- Maintain a strong understanding of market valuation methodologies and investor frameworks.
- Support capital management decision-making through an investor and market lens.
- Assist in equity, debt and other capital market activities when required
- Provide insight into market expectations regarding capital allocation, dividends, growth investment and balance sheet management

Experience, Attributes and Qualifications

- Experience in Investor Relations, Corporate Finance, Financial Analysis, or Equity Research
- Strong understanding of financial statements, valuation, and market dynamics
- Experience working in a listed company or with capital markets exposure preferred
- Experience preparing or supporting investor communications and presentations
- Strong financial literacy and analytical capability
- Excellent written and verbal communication skills
- Ability to translate complex financial information into clear, compelling narratives
- Understanding of disclosure requirements and regulatory environments
- High attention to detail and accuracy
- Strong stakeholder management and relationship-building capability
- Commercially astute with awareness of market dynamics
- Confident communicator with executive presence
- Highly organised with ability to manage tight deadlines (e.g. results cycles)
- Professional, credible, and able to operate with discretion

This job description provides an overview of the responsibilities and outcomes of the role. You may be required to perform job related tasks other than those specified.

