

21 March 2019

Equity Trustees brings global expertise to Aussie fund managers' doorstep

The total funds invested in Australia of around A\$3.5 trillion (A\$2.7 trillion in retirement funds and approximately A\$1.5bn in fund structures) pales in comparison to some global investment markets.

Two of the countries that lead the world as centres for collective investment vehicles are Luxembourg and Ireland. Luxembourg alone has around €6 trillion in collective investment vehicles, while Ireland has €2.5 trillion.

Europe has among the most sophisticated investment structures and regulations in the world and there is much Australia can learn from the models used overseas to provide investor protection and build vibrant, secure investment structures.

Equity Trustees has recently taken steps to expand offshore into the UK and Europe (via Ireland) to serve growing demand by fund managers to operate globally.

Just days after the Brexit deadline, our representatives from our UK/Europe and US offices are arriving in Australia to share updates around global topics in relation to these highly attractive – but sometimes complex - markets.

- Brexit – What happens now? And what does it mean for funds management in the UK and the European Union?
- How Australian fund managers can expand into Asia via UCITS structures
- Why expand investment products into Cayman Islands, London, Dublin or Luxembourg

See over page for speaker details:

- Harvey Kalman, Executive General Manager, Corporate Trustee Services & Global Head of Fund Services
- James Gardner, Co-CEO, Fund Services (UK and Europe)
- Rob Harrison, US Representative, Fund Services

Media are invited to attend the session in Sydney on Thursday 4 April 2019 (12.15pm – 2pm). Separate interviews can be arranged outside this session presentation time.

MEDIA INQUIRIES

Alicia Kokocinski
Senior Manager Marketing & Communications
03 8623 5396 / 0403 172 024
akokocinski@eqt.com.au

Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for external Fund Managers. Corporate Trustee Services is provided by Equity Trustees Limited (ABN 46 004 031 298) AFSL 240975 which is a subsidiary of EQT Holdings Limited (ABN 22 607 797 615), a publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Bendigo, Sydney, Brisbane, Perth and London.



GLOBAL REPRESENTATIVE TEAM BIO'S



Harvey Kalman

Head of Global Funds Services & Executive General Manager

Harvey oversees the global Funds Services business of Equity Trustees, and is responsible for the operational compliance of all Management Company (ManCo), Authorised Corporate Director (ACD), Responsible Entity (RE) and Corporate Trustee (Trustee) relationships. He joined Equity Trustees as General Manager, Funds Management in January 2000 and now has more than 25 years' experience in the financial services industry. Previous experience includes KPMG, as a consultant to the Funds Management industry, as well as ANZ Banking Group and the Australian Society of Corporate Treasurers.



James Gardner

Co-CEO (UK & Europe)

James began his financial services career in 1994 when he joined M&G Securities followed by International Financial Data Services (IFDS), the UK's largest Transfer Agent, where he remained for 12 years before transitioning to IFDS Managers to work on the establishment and development of the group's Independent ACD business. In 2013 James joined Fund Partners as Client Director when IFDS Managers was acquired by the PPAL Group. Since it was established in January 2017, James has overall responsibility for Equity Trustees (UK & Europe) Business Development strategy and direct responsibility for Client Relationship Management, Product Development, Project Management and Distribution Oversight functions for the Regulated subsidiary businesses.



Robert Harrison

US Representative

Robert has global leadership experience in institutional asset management and asset owner industries. Most recently, he was Regional Head of North America at BNP Paribas Investment Partners (BNPPIP); President and CEO, Fischer Francis Trees and Watts (FFTW); and Global Head of BNPPIP Institutional Fixed Income. Prior, he was Australian CEO of BNPPIP and served on the Asia Pacific Management Committee. During his tenure at BNPPIP, Robert held directorships in Australia, Canada, Hong Kong, Japan, UK and USA.