

22 February 2012

Appointment

The philanthropy business of Equity Trustees Limited (EQT) has employed Ms Cari Jackson Lewis, an experienced American estate planning attorney, to a maternity leave position.

Ms Tabitha Lovett, head of philanthropy at EQT, says that the culture of philanthropy and charitable trusts in the USA is well-known as the most advanced in the world.

“Cari’s experience in working with high net-worth individuals and Fortune 500 corporations in the US will be very useful to EQT.

“EQT has over 125 years experience and expertise in setting up and managing Australian charitable trusts and we are always seeking to enhance our approaches.

“Having access to the experience and knowledge of someone like Cari, who has worked in a very sophisticated charitable trust market where philanthropy is a natural and integral part of estate planning, will expose us to new ways of thinking,” Ms Lovett said.

In addition to her work in estate planning, Cari has also been involved in *pro bono* family law services for indigent women and children, refugees and the homeless, as well as corporate services for not-for-profit organisations.

In Australia, she has previously worked as Special Counsel at Australian Executor Trustees (AET) in Melbourne in a business development role to promote AET as a provider of fiduciary services to law firms, financial planners, the philanthropic community and the not-for-profit sector.

She was also the Grants and Awards Manager at the Victoria Law Foundation, where she oversaw the annual distribution of over \$500,000 in grants to improve Victorians understanding of the law and access to justice.

She has a law degree from Fordham University School of Law in New York.

About Equity Trustees: *Equity Trustees is a publicly listed company that provides a range of financial services to corporate and private clients. Its businesses include private client wealth management, funds management, responsible entity appointments, and corporate and personal superannuation.*

The company manages over \$4 billion in its funds management, private client and superannuation businesses and has more than \$19 billion under responsible entity administration. Equity Trustees employs over 180 people in its Melbourne, Sydney and Brisbane offices.

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