

JOINT PRESS RELEASE

3 JUNE 2014



FEAL partners with La Trobe Financial on 2014 CIO & COO Awards

FEAL has partnered with La Trobe Financial for the next three years in operating the CIO & COO Awards and has announced the date for this year's Awards ceremony. **Tuesday, 2 December 2014** is set for the industry's Annual National Awards for Chief Investment Officer (CIO) and Chief Operating Officer (COO). The Awards, established in 2011 by La Trobe Financial, a leading credit specialist Fund Manager, aim at recognising excellence and continued professional development in the superannuation industry.

The Awards are the only one of their kind and have proved to be very popular with industry participants, because they are personal and reward recipients with a study grant of \$10,000 each. *"The two of us working together felt like a natural fit"* said FEAL CEO Joanna Davison, *"...like the FEAL Fund Executive of the year Awards, the **La Trobe Financial FEAL CIO & COO Awards** will complement our current recognition of industry leaders".* These Awards recognise the important achievements of key executives responsible for the retirement savings of our fellow Australians.

FEAL will now takeover the running of the Awards with La Trobe Financial as lead Sponsor. The Awards cocktail format will be retained and will continue to benefit from the independent Awards Judging panel which includes Greg Bright as Awards panel Chair, Greg O'Neill (La Trobe Financial), Chris Page (Rainmaker), Jeff Bresnahan (SuperRatings), David Coogan (PwC), and Neil Cochrane (Chairman of FEAL).

Applications will open at the end of June and can be accessed through the FEAL website or www.CIOCOOAwards.com.au

The **La Trobe Financial FEAL CIO & COO Awards** are open to staff in like positions at fiduciary funds, including superannuation funds, government funds, statutory insurance funds, and multi-managers funds. Last year's winners were Gerald Parlevliet, the CIO of the big corporate superannuation fund for Commonwealth Bank staff, Commonwealth Bank Group Super, who won Chief Investment Officer of the Year. The Chief Operating Officer of the Year was won by Graeme Arnott, the COO of the NSW Government fund, First State Super. The award ceremony was attended by over 150 industry participants.

Joanna Davison, CEO of FEAL said the FEAL Board is excited to be taking on the CIO & COO Awards as they believe these Awards are very important for industry. Davison stated *"FEAL is proud to be able to take on these important Awards with La Trobe Financial and to see the Awards move to the next level. The Awards encourage decision makers to continue to pursue world's best practice investment and operational strategies and processes in our superannuation industry. The continually changing regulatory and investment environment present challenges for investment professionals, and the La Trobe Financial FEAL CIO & COO Awards recognise the important responsibility placed on CIOs and COOs in our industry."*

La Trobe Financial as lead Sponsor, will also sponsor the prize money of \$20,000. Greg O'Neill, La Trobe Financial's President & CEO stated *"joining forces with FEAL was the right partnership for us, as FEAL has a special focus on recognising efforts made by decision makers looking after our retirement savings. It is clear to us that our retirement savings are in good hands, and from what we have seen over the past decade their performance has been exemplary and deserves recognition."*

The Awards will continue the same format and the winners will be announced at a cocktail party scheduled for **Tuesday, 2 December 2014**. Further announcements will be made shortly.

Issued by La Trobe Financial and FEAL



Greg O'Neill
President & CEO
La Trobe Financial



Joanna Davison
Chief Executive Officer
FEAL



For all media enquiries relating to this Press Release, please contact

Caterina Nesci
Marketing & Media Manager
t: +613 8610 2842
m: +61 422 270 474

About La Trobe Financial

La Trobe Financial is one of Australia's leading Fund Managers specialising in credit. We have been a proven and trusted investment partner, for institutional and retail investors alike for over 60 years, managing investment mandates in excess of A\$10 billion. Our asset class remains a proven performer across all economic cycles. We offer strong absolute and risk-adjusted returns with exceptionally low volatility, with low correlation to other key asset classes. La Trobe Financial is rated by Zenith, SQM Research, Lipper Ratings and Lonsec, with offices in Melbourne, Sydney and Shanghai. These can be viewed on our website. La Trobe Financial Services Pty Limited – Australian Credit Licence No. 392385. La Trobe Financial Asset Management Pty Limited – Australian Credit Licence No. 222213.

Disclaimer: La Trobe Financial Asset Management Limited ABN 27 007 332 363 & AFS Licence No. 222213 is the issuer and manager of the La Trobe Australian Mortgage Fund. It is important for you to read the Product Disclosure Statement for the Fund before you make an investment decision. The PDS is available on our website www.latrobefinancial.com.au or by calling 1800 818 818. Past performance is no guarantee of future performance. The rates of return from the Fund are not guaranteed and are determined by the future revenue of the Fund and may be lower than expected. Investors risk losing some or all of their principal investment. The investment is not a bank deposit. Withdrawal rights are subject to liquidity and may be delayed or suspended. The rating is only one factor to be taken into account in deciding to invest.

Zenith's "recommended" rating indicates that it has high confidence in the manager meeting its objectives. The Zenith Investment Partners ("Zenith") ABN 60 332 047 314 rating referred to in this document is limited to "General Advice" (as defined by section 766B of Corporations Act 2001) and based solely on the assessment of the investment merits of the financial product on this basis. It is not a specific recommendation to purchase, sell or hold the relevant product(s), and Zenith advises that individual investors should seek their own independent financial advice before investing in this product. To view the relevant research information, please visit www.latrobefinancial.com.au. The rating is subject to change without notice and Zenith has no obligation to update this document following publication. Zenith usually receives a fee for rating the fund manager and product against accepted criteria considered comprehensive and objective. SQM Research – 4 stars to 4.25 stars – superior, suitable for inclusion on most Approved Product Lists. To view the relevant research information, please visit www.latrobefinancial.com.au. This rating will not take into account your, or your clients' objectives, financial situation or needs. It is up to investors to consider whether specific financial products are suitable for your objectives, financial situation or needs. Research houses receive a fee from La Trobe Financial for rating the product. Lipper Leaders Rating – Total Return (Score – 5) are not intended to predict future results and does not guarantee the accuracy of this information. More information is available at www.lipperweb.com. Thomson Reuters Copyright, All Rights Reserved. Lipper Ratings for Total Return reflect funds' historical return performance relative to peers. The ratings are subject to change every month. The highest 20% of funds in each peer group are named Lipper Leader or a score of 5 for Total Return. Lonsec – "recommended" – indicates that Lonsec has conviction that the fund or product can achieve its objectives and, if applicable, outperform peers over an appropriate investment timeframe. The Lonsec rating (assigned June 2012) presented in this document is published by Lonsec (who is Lonsec Limited ABN 56 061 751 102 AFSL No. 246842 and Lonsec Research Pty Ltd ABN 11 151 658 561, Corporate Authorised Representative of Lonsec Limited). The rating is a "class service" (as defined in the Financial Advisers Act 2008 (NZ)) or is limited to "General Advice" and based solely on consideration of the investment merits of the financial product(s). It is not a recommendation to purchase, sell or hold the relevant product(s), and you should seek independent financial advice before investing in this product(s). The rating is subject to change without notice and Lonsec assumes no obligation to update the relevant document(s) following publication. Lonsec receives a fee from the Fund Manager for researching the product(s) using comprehensive and objective criteria.