

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
18-02-2019	Australian Scholarships Group (ASG)	Bruce Hawkins COO - Employer rep Stacey Glen Head of HR - Employer rep Peter Taubman - Member rep Angela Mylrea - Member rep	Marigold Bustamante - Workplace Solutions Manager Jeremy Ferguson - National Manager Workplace Frank Lombardo - GM Client & Process Charles Kneale - Investment Specialist Peter Mann - Insurance Specialist	NA
21-02-2019	Bendigo and Adelaide Bank	Julia Bateman Helen Sweeney David Robertson Stuart McGibbon James Orr Sally Shepherdson Haley Tudor-Harrop	Eddie Wasilewski - Workplace Solutions Manager Jeremy Ferguson - Acting National Manager, Workplace Stanley Yeo – Deputy Chief Investment Officer Mark Oliver - General Manager Distribution Peter Mann - National Specialist, Workplace Super and Group Life	
11-04-2019	Heritage Bank	Peter Haller Anthony Johns Bill Armagnacq Kevin, Gates Nathaniel Young Megan Hoper Darren Stephens (HR)	Tony Newstead - Workplace Solutions Manager Jeremy Ferguson - National Workplace Manager Tim Casey - Investment Specialist	
08-05-2019	UG Manufacturing	Christie Lockyer Andrew Bruenjjes	Eddie Wasilewski - Workplace Solutions Manager	Peter Clark - DCA Advisors
29-May-19	The Perth Mint	James Sawyer Jane King Tim Leach Michael Dymock Chris Dimond Nathan Edwards	Shane Ingate - Workplace Solutions Manager	
29-05-2019	Heritage Bank	Kevin, Gates Nathaniel Young Peter Haller Anthony Johns Bill Armagnacq Megan Hooper	Tony Newstead Jeremy Ferguson	

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
30-05-2019	Bendigo and Adelaide Bank	Julia Bateman Helen Sweeney David Robertson Stuart McGibbon James Orr Sally Shepherdson Haley Tudor-Harrop	Eddie Wasilewski - Workplace Solutions Manager Jeremy Ferguson - Acting National Manager, Workplace Dan Farmer - Chief Investment Officer Frank Lombardo - Group General Manager – Client & Process	
31-05-2019	Bell Potter Securities Limited	Gary Stranger Sarah Gorton Carolyn Long Dean Davenport	Eddie Wasilewski - Workplace Solutions Manager Jeremy Ferguson - National Manager, Workplace	
12-Jun-19	BGC	Rochelle Ballem Phil Jack Nadia Lake Rachelle Finn Brad Lines Allen Taylor Regina Boog	Shane Ingate - Workplace Solutions Manager Jeremy Ferguson - National Workplace Manager Charles Kneale - Investment Specialist	
29-08-2019	Bendigo and Adelaide Bank	Julia Bateman Helen Sweeney Stuart McGibbon James Orr Sally Shepherdson Sandy Nevill Andrew Price	Eddie Wasilewski - Workplace Solutions Manager Jeremy Ferguson - National Manager, Workplace Dan Farmer - Chief Investment Officer Brett Marshall - Head of the Office of Superannuation Trustee	
25-09-2019	Heritage Bank	Craig Jones Daniel Mellish Peter Haller	Tony Newstead Jeremy Ferguson Tim Casey	
30-09-2019	Police Credit Union	Annie Rafferty Head of HR - Employer rep Peter Schar Director - Employer rep Laura Fountain - Employer rep Linda Ginever - Member rep Marina Gvozdeva - Member rep	Marigold Bustamante - Workplace Solutions Manager Jeremy Ferguson - National Manager Workplace Charles Kneale - Investment Specialist	Mark Tyminski - Bridges

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
19-01-2018	Crown Equipment	Michael Grogan - Employer Rep Justin Newbury - Employer Rep Steve Pride - Member Rep Kylie Cheal - Member Rep Kylie Bate - Payroll Manager	Joshua Gaughan - Workplace Solutions Manager	Direct - Removed Adviser
22-02-2018	Bendigo and Adelaide Bank	Simon Rawstron Carol Sheahan Helen Sweeney Sarah Brooks Michael Rosemond Haley Tudor-Harrop David Robertson Stuart McGibbon Ben Edwards	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Manager, Workplace Stanley Yeo – Portfolio Manager, International Equities & Strategy Peter Mann - National Specialist, Workplace Super and Group Life	
23-03-2018	Zurich Aust P/L	Kim McCutcheon - Employer Rep Jacclyn Nautiyal - Employer Rep Kate Deering - Member Rep Robert Stansfield - Member Rep	Joshua Gaughan - Workplace Solutions Manager Simon Gross - investment Portfolio Manager	Direct Client
28-03-2018	Amway Aust P/L	Lynne Boshel - Employer Rep Craig Lambert - Employer rep Gary Chen - Member Rep Nirmit Shah - Member Rep	Joshua Gaughan - Workplace Solutions Manager	Mario Isaias - Harvest Financial Mick Kennedy - Harvest Insurance Specialist
10-05-2018	Tronox	Kate Smith - Employee Representative Mat Helms - Employee Representative Graeme Dorrington - Remuneration Specialist Amber Thomson - HR Advisor Russell Austin - General Manager, Australia	Nick Villamagna - Workplace Solutions Manager Chris Deakin - National Manager Workplace Dan Farmer - Chief Investment Officer	
15-05-2018	Flight Centre Travel Group (FCTG)	Richard Humphreys Carole Cooper Michael Snyman Shelley Poten Sean Martin	Steve Black - Head of Client Delivery Stanley Yeo - Portfolio Manager, Investments Chris Deakin - National Manager - Workplace Peter Mann - National Specialist, Workplace Super & Group Life Jeremy Ferguson - Workplace Solutions Manager	Ange Greenhalgh - Moneywise Global Bridget Wallington - Moneywise Global
18-05-2018	Crown Equipment	Justin Newbury - Employer Rep Kylie Bate - Payroll Manager	Joshua Gaughan - Workplace Solutions Manager Peter Mann - Group Life Specialist	Direct
18-05-2018	MSA	Jenny Jackson Catherine Wang	Jeremy Ferguson - Workplace Solutions Manager	David Lewis - Professional Financial Services Brendan Paddison - Lifestyle Financial Services Kirsty Balzan - Lifestyle Financial Services
18-05-2018	TSA Group	Cornelio Ecle - Employee Representative Chitrang Gautum - Employee Representative Jessica Foo- Employer Representative Catherine Aguila - Employer Representative	Nick Villamagna - Workplace Solutions Manager	Chris Rule - Tailormade Financial Strategies

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
25-May-18	The Perth Mint	Jane King James Sawyer Tim Leach	Craig Peckham - Workplace Solutions Manager	
25-05-2018	Heritage Bank	Kevin, Gates Nathaniel Young Megan Hooper Vivienne Quinn Stephen Davis Bill Armagnacq Darren Stephens (HR)	Tony Newstead - Workplace Solutions Manager Ben Worsley - Workplace Solutions Manager Tim Casey - Investment Specialist	
22-05-2018	IOOF Staff Super	Paul Vine Company Secretary - Employer rep Ingrid Liepins Head HR - Employer rep David Coulter CFO - Employer rep Sue Herrald - Member rep Andrea Tanner - Member rep	Marigold Bustamante Workplace Solutions Manager Bruce Mason National Product Manager Stanley Yeo Investment CIO Chris Deakin National Manager Workplace	NA
31-05-2018	Bendigo and Adelaide Bank	Simon Rawstron Helen Sweeney Sarah Brooks Michael Rosemond David Robertson Stuart McGibbon Mark Schultz Julia Bateman Sally Shepherdson	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Manager, Workplace Stanley Yeo – Portfolio Manager, International Equities & Strategy	
01-06-2018	Mundipharma	Mr R Ingui Mr D Byers Mr P Large Mr F Dias Ms M Arnold	Jeremy Ferguson - Workplace Solutions Manager Tim Casey - National Specialist - Multi Manager Solutions	Michael Crompton - Certe Group
13-06-2018	BGC	Phil Jack - Employee Representative John Hick - Employee Representative Rochelle Ballem - Employer Representative Nadia Lake - Employer Representative	Nick Villamagna - Workplace Solutions Manager	Anthony Warman - Super Advice Services
06-Jun-18	Ausdrill	Michelle Narustrang Peter Chisholm Garth Reardon	Craig Peckham - Workplace Solutions Manager	
26-06-2018	Ord Minnett	Mr R. Cloughton Mr M. Tindale Mr M. Arthur Ms L. Richards	Jeremy Ferguson - Workplace Solutions Manager Ben Wright - Workplace Solutions Manager	N/A

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
23-08-2018	Police Credit Union	Peter Schar Director - Employer rep Linda Ginever - Member rep Marina Gvozdeva - Member rep	Marigold Bustamante - Workplace Solutions Manager Charles Kneale - Investment Specialist	Virginia Hutchins - Bridges
30-08-2018	Bendigo and Adelaide Bank	Simon Rawstron Helen Sweeney David Robertson Stuart McGibbon Mark Schultz Sally Shepherdson Ben Edwards Haley Tudor-Harrop	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Manager, Workplace Stanley Yeo – Portfolio Manager, International Equities & Strategy Peter Mann - National Specialist, Workplace Super and Group Life	
12-09-2018	Zurich Aust P/L	Jaclyn Nautiyal - Employer Rep Kate Deering - Member Rep Robert Stansfield - Member Rep Marie Steart - Payroll Manager	Joshua Gaughan - Workplace Solutions Manager Simon Gross - investment Portfolio Manager	Direct Client
12-10-2018	UG Manufacturing	Melinda Smith Andrew Bruenjes	Eddie Wasilewski - Workplace Solutions Manager	Peter Clark - DCA Advisors Adam Grigoropoulos - DCA Advisors
18-10-2017	Amway Aust P/L	Lynne Boshel - Employer Rep Craig Lambert - Employer rep Gary Chen - Member Rep Nirmit Shah - Member Rep	Joshua Gaughan - Workplace Solutions Manager	Mario Isaias - Harvest Financial Mick Kennedy - Harvest Insurance Specialist Luke MacIntosh - Investors Mutual Ltd
24-10-2018	Finity Consulting	Santino Iemma - Employer Rep Gillian Harrex - Member Rep Jacob Mamutil - Member Rep	Joshua Gaughan - Workplace Solutions Manager Mark Oliver - General Manager - Distribution	Michael Loizou - Capital Results
08-11-2018	Bell Potter Securities Limited	Gary Stranger Sarah Gorton Carolyn Long	Eddie Wasilewski - Workplace Solutions Manager	
09-11-2018	IOOF Staff Super	Paul Vine Company Secretary - Employer rep Ingrid Liepins Head HR - Employer rep David Coulter CFO - Employer rep Sue Herrald - Member rep Stephen George - Member rep Andrea Tanner - Member rep	Eddie Wasilewski Workplace Solutions Manager Peter Mann Insurance Specialist Charles Kneale Investment Specialist	NA
21-11-2018	Greenstone Financial Services	Denise Harvey Maxine Cutter Sai Shankhar Simone Bolsover Anneke Murphy Jocelyn Balke	Ben Wright - Workplace Solutions Manager Joshua Gaughan - Workplace Solutions Manager	N/A

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
22-11-2018	Flight Centre Travel Group (FCTG)	Richard Humphreys Carole Cooper Michael Snyman Shelley Poten Sean Martin Haydn Long Alicia Kerwin	Steve Black - Head of Client Delivery Mark Oliver - General Manager, Distribution Dan Farmer - Chief Investment Officer Lisa Kauppinen - Head of ClientFirst Peter Mann - National Specialist, Workplace Super & Group Life Tim Casey - National Specialist, Multi Manager Solutions Jeremy Ferguson - National Manager, Workplace	John Tuohy - Moneywise Global Chris Herdman - Moneywise Global
23-11-2018	Hollard Insurance	Guy Martin - Employer Rep Paul Natili - Employer Rep David Simpson - Member Rep Sofia Petrov - Member Rep	Joshua Gaughan - Workplace Solutions Manager Ben Wright - Workplace Solutions Manager	Direct
23-11-2018	Mundipharma	Mr R Ingui Mr D Byers Mr P Large Mr F Dias Ms M Arnold	Jeremy Ferguson - Workplace Solutions Manager	Michael Crompton - Certe Group
23-Nov-18	AMA	Danby Sequiera Venus Wong Jila Jahromy Sarah O'Sullivan	Shane Ingate - Workplace Solutions Manager	
29-11-2018	Bendigo and Adelaide Bank	Simon Rawstron Helen Sweeney David Robertson Stuart McGibbon Mark Schultz Sally Shepherdson Ben Edwards Haley Tudor-Harrop Michael Rosemond Julia Bateman	Eddie Wasilewski - Workplace Solutions Manager Jeremy Ferguson - Acting National Manager, Workplace Stanley Yeo – Deputy Chief Investment Officer Peter Mann - National Specialist, Workplace Super and Group Life Mark Oliver - General Manager Distribution	
05-Dec-18	BGC	Rochelle Ballem Phil Jack Nadia Lake Rachelle Finn Brad Lines Allen Taylor John Hick Regina Boog	Shane Ingate - Workplace Solutions Manager	
14-12-2018	PetSure	Annette Finck - Employer Rep Patrick Ramsden - Member Rep Ann Hromchit - Member Rep	Joshua Gaughan - Workplace Solutions Manager Ben Wright - Workplace Solutions Manager	Direct

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
23-02-2017	Bendigo and Adelaide Bank	Simon Rawstron Carol Sheahan Helen Sweeney Sarah Brooks David Robertson Michael Rosemond Mark Schultz	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Key Account Manager Dan Farmer - Portfolio Manager Australian Equities	
02-03-2017	Zurich Aust P/L	Kim McCutcheon - Employer Rep Linda Strangherlin - Employer Rep Kate Deering - Member Rep Marie Steart - Payroll Manager	Joshua Gaughan - Workplace Solutions Manager Dan Farmer - Chief Investment Officer	Direct Client
31-03-2017	MMA Offshore	Neale Waller - Employee Representative Dylan Roberts - Employee Representative Malcolm Vogler - Employer Representative Jo Anne Hatton - Employer Representative	Nick Villamagna - Workplace Solutions Manager	
03-05-2017	Amway Aust P/L	Gary Chen - Member Rep Nirmit Shah - Member Rep Sarah Street - Employer Rep Craig Lambert - Employer rep Marites Gonzales - Payroll	Joshua Gaughan - Workplace Solutions Manager	Mario Isaias - Harvest Financial Mick Kennedy - Harvest Insurance Specialist
03-05-2017	Police Credit Union	Marina Gvozdeva - Member rep	Craig Peckham - Workplace Solutions Manager Charles Kneale - Investment Specialist	Linda Ginever - Bridges
05-05-2017	Flight Centre Travel Group (FCTG)	Richard Humphreys Carole Cooper Michael Snyman Shelley Poten Haydn Long Sean Martin	Steve Black - Head of Client Delivery Chris Deakin - National Manager - Workplace Jeremy Ferguson - Workplace Solutions Manager Suzie Brown - TAL	Paul Mann - Monywise Global Catherine Navarro - Moneywise Global
15-05-2017	Tronox	Kate Smith - Employee Representative Mary Aiton - Employee Representative Helen Ker - Employee Representative Kelly Carter - Manager HR, APAC Graeme Dorrington - Remuneration Specialist Tony Orrell - Director – Finance Russell Austin - General Manager, Australia	Nick Villamagna - Workplace Solutions Manager Chris Deakin - National Manager Workplace Dan Farmer - Portfolio Analyst, Aust. Equities	
17-05-2017	UG Manufacturing	Megan Love Laura Welsh	Eddie Wasilewski - Workplace Solutions Manager	Peter Clark - DCA Advisors
25-05-2017	Mundipharma	Mr R Ingui Mr P Large Mr F Dias Ms N Keary Ms M Arnold	Jeremy Ferguson - Workplace Solutions Manager	Michael Crompton - Certe Group

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
25-05-2017	TSA Group	Cornelio Ecle - Employee Representative Chitrank Gautum - Employee Representative Jessica Foo- Employer Representative Catherine Aguila- Employer Representative	Nick Villamagna - Workplace Solutions Manager	Chris Rule - Tailormade Financial Strategies
01-06-2017	Bendigo and Adelaide Bank	Simon Rawstron Carol Sheahan Helen Sweeney Sarah Brooks Michael Rosemond Kasia Jansen David Brennan Lynn Hayward	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Key Account Manager Stanley Yeo – Portfolio Manager, International Equities & Strategy	
09-06-2017	MSA	Jenny Jackson John Kavallaris Catherine Wang	Jeremy Ferguson - Workplace Solutions Manager	David Lewis - Northbridge Financial Consulting Brendan Paddison - Northbridge Financial Solutions Shane Foster - Lifestyle Financial Services
14-06-2017	Ord Minnett	Mr R. Cloughton Mr M. Tindale Mr M. Arthur Ms L. Anderson	Jeremy Ferguson - Workplace Solutions Manager	N/A
19-06-2017	IOOF Staff Super	Paul Vine Company Secretary - Employer rep Ingrid Liepins Head HR - Employer rep David Coulter CFO - Employer rep Sue Herral - Member rep Stephen George - Member rep Andrea Tanner - Member rep	Marigold Bustamante Workplace Solutions Manager Michelle Voudouris Product Manager Charles Kneale Investment Specialist Chris Deakin National Manager Workplace	NA
18-07-2017	Crown Equipment	Michael Grogan - Employer Rep Justin Newbury - Employer Rep Steve Pride - Member Rep Kylie Cheal - Member Rep Kylie Bate - Payroll Manager	Joshua Gaughan - Workplace Solutions Manager Peter Mann - Group Life Specialist	Patrick Dieter - Findex Group
31-07-2017	Zurich Aust P/L	Kim McCutcheon - Employer Rep Bevan Green -Employer Rep Robert Stansfield - Member Rep Marie Steart - Payroll Manager	Joshua Gaughan - Workplace Solutions Manager Simon Gross - investment Portfolio Manager Charles Kneale - Investment Specialist	Direct Client
30-08-2017	Flight Centre Travel Group (FCTG)	Richard Humphreys Carole Cooper Michael Snyman Shelley Poten Haydn Long Sean Martin	Steve Black - Head of Client Delivery Stanley Yeo - Portfolio Manager, Investments Jeremy Ferguson - Workplace Solutions Manager Peter Mann - National Specialist, Workplace Super & Group Life	Ange Greenhalgh - Moneywise Global



Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
31-08-2017	Heritage Bank	Kevin, Gates Nathaniel Young Vivienne Quinn Stephen Davis Bill Armagnacq Darren Stephens (HR)	Tony Newstead - Workplace Solutions Manager	
07-09-2017	Bendigo and Adelaide Bank	Simon Rawstron Carol Sheahan Helen Sweeney Sarah Brooks Michael Rosemond Haley Tudor-Harrop David Brennan Lynn Hayward David Robertson Ben Edwards Stuart McGibbon	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Key Account Manager Stanley Yeo – Portfolio Manager, International Equities & Strategy Peter Mann - National Specialist, Workplace Super and Group Life	
11-10-2017	Bell Potter Securities Limited	Gary Stranger Dean Davenport Rachel Williamson	Eddie Wasilewski - Workplace Solutions Manager	
18-10-2017	Amway Aust P/L	Lynne Boshel - Employer Rep Craig Lambert - Employer rep Gary Chen - Member Rep Nirmit Shah - Member Rep	Joshua Gaughan - Workplace Solutions Manager	Mario Isaias - Harvest Financial Mick Kennedy - Harvest Insurance Specialist Luke MacIntosh - Investors Mutual Ltd
23-10-2017	Hollard Insurance	Guy Martin - Employer Rep Paul Natili - Employer Rep Michael Smith - Employer Rep Andries Schoeman - Member Rep Sofia Petrov - Member Rep Richard Hughes - Member Rep David Simpson - Member Rep	Joshua Gaughan - Workplace Solutions Manager Charles Kneale - Investment Specialist	Direct
25-Oct-17	The Perth Mint	David Woodford Jane King James Sawyer	Craig Peckham - Workplace Solutions Manager	
31-10-2017	Police Credit Union	Annie Rafferty Head of HR - Employer rep Peter Schar Director - Employer rep Marina Gvozdeva - Member rep Brenda Davidson - Member rep	Craig Peckham - Workplace Solutions Manager	
03-11-2017	Mundipharma	Mr R Ingui Mr D Byers Mr P Large Mr F Dias Ms N Keary Ms M Arnold	Jeremy Ferguson - Workplace Solutions Manager Charles Kneale - National Specialist - Multi Manager Solutions Tim Casey - National Specialist - Multi Manager Solutions	Michael Crompton - Certe Group

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
14-11-2017	IOOF Staff Super	Paul Vine Company Secretary - Employer rep Ingrid Liepins Head HR - Employer rep Sue Herrald - Member rep Stephen George - Member rep	Marigold Bustamante Workplace Solutions Manager Michelle Voudouris Product Manager Stanley Yeo Investment CIO Chris Deakin National Manager Workplace	NA
01-12-2017	Flight Centre Travel Group (FCTG)	Richard Humphreys Carole Cooper Michael Snyman Shelley Poten	Renato Mota - Head of Wealth Management Stanley Yeo - Portfolio Manager, Investments Jeremy Ferguson - Workplace Solutions Manager Chris Deakin - National Manager - Workplace	Ange Greenhalgh - Moneywise Global
04-12-2017	Australian Scholarships Group (ASG)	Kevin Brown CFO - Employer rep Vicki Blackman Head of HR - Employer rep Peter Taubman - Member rep	Marigold Bustamante - Workplace Solutions Manager Eddie Wasilewski - Workplace Solutions Manager Charles Kneale - Investment Specialist	NA
12-12-2017	Bendigo and Adelaide Bank	Simon Rawstron Carol Sheahan Helen Sweeney Sarah Brooks Michael Rosemond Haley Tudor-Harrop David Brennan David Robertson Stuart McGibbon Mark Schultz	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Manager, Workplace Dan Farmer - Chief Investment Officer Peter Mann - National Specialist, Workplace Super and Group Life Frank Lombardo - Group General Manager – Client & Process	

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
12-02-2016	Mundipharma	Mr R Ingui Mr D Byers Mr P Large Ms N Keary Ms D Jotwani	Jeremy Ferguson - Workplace Solutions Manager	Michael Crompton - Certe Group
24-02-2016	Continental Pty Ltd	Angie Angelovski Rob Prouse Marita Wachter Steven Murphy Andrew Dymke Philipp Streicher	Eddie Wasilewski - Workplace Solutions Manager Melinda Di Vita - Workplace Solutions Manager	
02-03-2016	Australian Scholarships Group (ASG)	Kevin Brown CFO - Employer rep Jenny Port - Employer rep Joe Chakravartti - Member rep Peter Taubman - Member rep	Eddie Wasilewski - Workplace Solutions Manager Charles Kneale - Investment Specialist	NA
03-03-2016	Bendigo and Adelaide Bank	Simon Rawstron Peter Ormandy Helen Sweeney Sarah Brooks David Robertson Michael Rosemond Mark Schultz	Eddie Wasilewski - Workplace Solutions Manager Kim Rand - Senior Product Mgr, Insurance & platform Delivery Stanley Yeo – Portfolio Manager, International Equities & Strategy	
20-04-2016	Hollard Insurance	Guy Martin - Employer Rep Paul Natili - Employer Rep Sara Dowd - Employer Rep Richard Heliig - Employer Rep Karen De Mol - Employer Rep Mark Dawson - Member Rep David Simpson - Member Rep Richard Hughes - Member Rep Gregory Kitay - Member Rep Sofia Petrov - Member Rep	Joshua Gaughan - Workplace Solutions Manager Steve Merlicek - CIO	Direct
17-May-16	The Perth Mint	Caroline Delves David Woodford Jane King	Craig Peckham - Workplace Solutions Manager	
19-05-2016	Tronox	Kate Smith - Employee Super Representative Kahn Lyall - Employee Super Representative Mary Aiton - Employee Super Representative Helen Ker - Employee Super Representative David Fletcher - Vice President, People, Safety & Environment Crystal Murphy - Manager HR, APAC Graeme Dorrington - Remuneration Specialist	Nick Villamagna - Relationship Manager Steve Black - Head of Employer Super Chris Deakin - National Key Account Manager	
31-05-2016	Police Credit Union	Annie Rafferty Head of HR - Employer rep Marina Gvozdeva - Member rep Brenda Davidson - Member rep	Craig Peckham - Workplace Solutions Manager	Linda Ginever - Bridges

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
02-06-2016	Bendigo and Adelaide Bank	Simon Rawstron Peter Ormandy Helen Sweeney Sarah Brooks David Robertson Michael Rosemond Mark Schultz Lynn Hayward	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Key Account Manager Dan Farmer - Portfolio Manager Australian Equities	
10-06-2016	MSA	Jenny Jackson John Kavallaris Catherine Wang	Jeremy Ferguson - Workplace Solutions Manager	David Lewis - Northbridge Financial Consulting Brendan Paddison - Northbridge Financial Solutions
30-08-2016	IOOF Staff Super	Ingrid Liepins Head HR - Employer rep Michael Stanelos - Employer rep Bruce Mason National Product Manager - Employer rep Nektar Vavoulas - Employer rep Jonathan Croome - Member rep Peter Mann - Member rep Tony Newstead - Member rep Yoges Vadiveloo - Member rep	Marigold Bustamante Workplace Solutions Manager	NA
01-09-2016	Bendigo and Adelaide Bank	Simon Rawstron Carol Sheahan Helen Sweeney Sarah Brooks David Robertson Michael Rosemond Peter Ormandy Mark Schultz	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Key Account Manager Steve Merlicek - Chief Investment Officer	
06-09-2016	Denso Automotive Systems Australia Pty Ltd	Wayne Jenkins Nick Petrakis Ross Webster Peter Baines	Eddie Wasilewski - Workplace Solutions Manager Melinda Di Vita - Workplace Solutions Manager	
08-09-2016	Finity Consulting	Santino Iemma - Employer Rep Scott Collings - Employer Rep Gillian Harrex - Member Rep Jacob Mamutil - Member Rep	Joshua Gaughan - Workplace Solutions Manager	Michael Loizou - Capital Results
16-09-2016	Heritage Bank	Kevin, Gates Nathaniel Young Bill Armagnacq Vivienne Quinn Stephen Davis	Tony Newstead - Workplace Solutions Manager Ben Worsley - Workplace Solutions Manager Stephen Merlicek - Chief Investment Officer	
22-09-2016	Mundipharma	Mr R Ingui Mr D Byers Mr P Large Ms N Keary Ms C Pircher	Jeremy Ferguson - Workplace Solutions Manager	Michael Crompton - Certe Group

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
31-10-2016	Hollard Insurance	Guy Martin - Employer Rep Paul Natili - Employer Rep Sara Dowd - Employer Rep Maxine Cutter - Employer Rep David Simpson - Member Rep Gregory Kitay - Member Rep Brenard Grobler - Member Rep Kassie Conway - Member Rep Sofia Petrov - Member Rep	Joshua Gaughan - Workplace Solutions Manager	Direct
08-11-2016	Police Credit Union	Annie Rafferty Head of HR - Employer rep Peter Schar Director - Employer rep Brenda Davidson - Member rep	Craig Peckham - Workplace Solutions Manager Charles Kneale - Investment Specialist	Linda Ginever - Bridges
15-11-2016	Ord Minnett	Mr R. Cloughton Mr M. Tindale Mr M. Arthur Ms K. Mo	Jeremy Ferguson - Workplace Solutions Manager	N/A
22-11-2016	Australian Scholarships Group (ASG)	Kevin Brown CFO - Employer rep Jenny Port - Employer rep Joe Chakravartti - Member rep Peter Taubman - Member rep	Melinda Di Vita - Workplace Solutions Manager Eddie Wasilewski - Workplace Solutions Manager Charles Kneale - Investment Specialist	NA
28-Nov-16	The Perth Mint	David Woodford Jane King James Sawyer	Craig Peckham - Workplace Solutions Manager	
01-12-2016	Bendigo and Adelaide Bank	Simon Rawstron Carol Sheahan Helen Sweeney Sarah Brooks David Robertson Michael Rosemond Mark Schultz	Eddie Wasilewski - Workplace Solutions Manager Chris Deakin - National Key Account Manager Stanley Yeo – Portfolio Manager, International Equities & Strategy	

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24-02-2015	Zurich Aust P/L	Ian Bendall - Employer Rep Chris Hilliard - Employer Rep Kate Deering - Member Rep Robert Stansfield - Member Rep	Joshua Gaughan - Workplace Solutions Manager Steve Merlicek - CIO Stephen Black - Head of Corporate Super	Direct Client
05-03-2015	Bendigo and Adelaide Bank	Mark Botten Frank Tassone Peter Ormandy David Robertson Michael Rosemond Pam Peterson Kasia Sczulca Helen Sweeney Mark Schultz	Eddie Wasilewski - Workplace Solutions Manager Steve Merlicek - Chief Investment Officer Stephen Black - Head of Employer Super	
11-03-2015	UG Manufacturing	Michael Fuller Julie Stack	Eddie Wasilewski - Workplace Solutions Manager	Peter Clark - DCA Advisors
17-03-2015	Heritage Bank	Kevin, Gates Nathaniel Young Vivienne Quinn Stephen Davis Bill Armagnacq Derek Sims	Tony Newstead - Workplace Solutions Manager	
29-04-2015	Amway Aust P/L	Gloria Mao Antonio Krunes Sarah Street Marites Gonzales Christine Terrill	Joshua Gaughan - Workplace Solutions Manager	Mario Isaias - Harvest Financial
07-05-2015	Mundipharma	Mr R Ingui Mr D Byers Mr T Trainer Mr P Large Ms N Keary	Jeremy Ferguson - Workplace Solutions Manager Charles Kneale - National Specialist - Multi Manager Solutions	Michael Crompton - Certe Group
20-05-2015	TSA Group	Matthew Hughes - Employee Representative Jessica Foo - Employee Representative Nicoletta Allia - Employer Representative Kristy Reed - Employer Representative	Nick Villamagna - Relationship Manager	Chris Rule - Tailormade Financial Strategies
21-05-2015	Bendigo and Adelaide Bank	Mark Botten Frank Tassone Kasia Szulca Helen Sweeney Sarah Brooks Pam Peterson Mark Schultz	Eddie Wasilewski - Workplace Solutions Manager Bruce Mason – Corporate Superannuation Product Manager Steve Merlicek - Chief Investment Officer Stephen Black - Head of Employer Super Kim Rand - Senior Product Mgr, Insurance & platform Delivery	
22-05-2015	MSA	Jenny Jackson John Kavallaris Catherine Wang	Jeremy Ferguson - Workplace Solutions Manager	David Lewis - Northbridge Financial Consulting Brendan Paddison - Northbridge Financial Solutions

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04-06-2015	Police Credit Union	Peter Schar Director - Employer rep Annie Rafferty Head of HR - Employer rep Marina Gvozdeva - Member rep Brenda Davidson - Member rep	Martina Townend - Business Development Officer	Linda Ginever - Bridges
09-06-2015	Ord Minnett	Mr R. Cloughton Mr M. Tindale Mr M. Arthur	Jeremy Ferguson - Workplace Solutions Manager	N/A
17-06-2015	Omya Australia	Andrew Mattinson Rob Tikoft Andrew Lackenby Wayne McCarthy Glenn Cameron	Jeremy Ferguson - Workplace Solutions Manager	N/A
22-06-2015	Amecc Foster Wheeler	Jacek Narozny - Employee Representative Angela Woolley - Employee Representative Pia Engstrom - Employer Representative Karen Sherriffs - Employer Representative	Nick Villamagna - Relationship Manager	Wayne Blazejczyk - Ballast Financial Management Pty Ltd
21-08-2015	Zurich Aust P/L	Kim McCutcheon - Employer Rep Gavin Pearce - Employer Rep Kate Deering - Member Rep Robert Stansfield - Member Rep	Joshua Gaughan - Workplace Solutions Manager Stephen Black - Head of Corporate Super	Direct Client
27-08-2015	Bendigo and Adelaide Bank	Mark Botten Frank Tassone Kasia Szulca Helen Sweeney Sarah Brooks Pam Peterson Mark Schultz Lynn Hayward David Robertson Michael Rosemond	Eddie Wasilewski - Workplace Solutions Manager Renato Mota - Head of Distribution Steve Merlicek - Chief Investment Officer Stephen Black - Head of Corporate Super	
30-09-2015	Kounis Metal Industries	Mildred Tan - Employee Representative Roy Haagman - Employee Representative Jack Iacovazzo - Employer Representative Colin Mitchell - Employer Representative	Nick Villamagna - Relationship Manager	
07-10-2015	Bell Potter Securities Limited	Gary Stranger Dean Davenport Kate Cribbes Rachel Williamson Sarah Gorton	Eddie Wasilewski - Workplace Solutions Manager Stephen Black - Head of Employer Super	
14-Oct-15	Activ	Michael Bowd Jonathon Thomas Steven Swift David Hatzon	Craig Peckham - Workplace Solutions Manager	
28-10-2015	Amway Aust P/L	Gloria Mao Antonio Krunes Sarah Street Marie Gonzales	Joshua Gaughan - Workplace Solutions Manager	Mario Isaias - Harvest Financial

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
29-10-2015	Hollard Insurance	Guy Martin - Employer Rep Paul Natili - Employer Rep Maxine Cutter - Employer Rep Sara Dowd - Employer Rep Richard Heliig - Employer Rep Mark Dawson - Member Rep David Simpson - Member Rep Zoe Lobegeier - Member Rep Olivia Goodchild - Member Rep Brenard Grobler - Member Rep	Joshua Gaughan - Workplace Solutions Manager Hugo Agudo - IOOF Investment Specialist	Direct
10-11-2015	Denso Automotive Systems Australia Pty Ltd	Wayne Jenkins Nick Petrakis Ross Webster Peter Baines	Eddie Wasilewski - Workplace Solutions Manager Melinda Di Vita - Workplace Solutions Manager	
17-11-2015	Police Credit Union	Annie Rafferty Head of HR - Employer rep Brenda Davidson - Member rep	Craig Peckham - Workplace Solutions Manager Martina Townend - Business Development Officer Charles Kneale - Investment Specialist	Linda Ginever - Bridges
20-11-2015	Heritage Bank	Nathaniel Young Derek Sims Vivienne Quinn Stephen Davis Bill Armagnacq	Tony Newstead - Workplace Solutions Manager Chris Deakin - National Workplace Manager Stephen Merlicek - Chief Investmentment Officer Charles Kneale - Investment Specialist	
24-11-2015	MMA Offshore	Neale Waller - Employee Representative Dylan Roberts - Employee Representative Jessica Lamont- Employer Representative Jo Anne Hatton- Employer Representative	Nick Villamagna - Relationship Manager	
26-11-2015	Bendigo and Adelaide Bank	Michelle Downing Simon Rawstron Peter Ormandy Helen Sweeney Lynn Hayward David Robertson Michael Rosemond	Eddie Wasilewski - Workplace Solutions Manager Renato Mota - Head of Distribution Stanley Yeo – Portfolio Manager, International Equities & Strategy Dave Marasco - Online Product Manager	
27-11-2015	MSA	Jenny Jackson John Kavallaris Catherine Wang	Jeremy Ferguson - Workplace Solutions Manager	David Lewis - Northbridge Financial Consulting Brendan Paddison - Northbridge Financial Solutions
01-12-2015	UG Manufacturing	Megan Love Julie Stack Nigel Philips	Eddie Wasilewski - Workplace Solutions Manager	Peter Clark - DCA Advisors
15-12-2015	Crown Equipment	Michael Grogan - Employer Rep Justin Newbury - Employer Rep Steve Pride - Member Rep Kylie Drayton - Member Rep Kylie Bate - Payroll Manager	Joshua Gaughan - Workplace Solutions Manager	Steve Wright - Centric Wealth



Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
28-07-2014	UG Manufacturing	Michael Fuller Julie Stack Maurice Espinal Andrew Bruenjes	Eddie Wasilewski - Workplace Solutions Manager	Peter Clark - DCA Advisors
05-08-2014	Zurich Aust P/L	Ian Bendall - Employer Rep Kate Deering - Member Rep Robert Stansfield - Member Rep	Joshua Gaughan - Workplace Solutions Manager Steve Merlicek - CIO Charles Kneale - Investment Specialist	
14-08-2014	Crown Equipment	Michael Grogan - Employer Rep Justin Newbury - Member Rep Kyle Bate - Member Rep	Joshua Gaughan - Workplace Solutions Manager	Roy Agranat - Centric Wealth
20-08-2014	Heritage Bank	Kevin, Gates Nathaniel Young Derek Sims Vivienne Quinn Stephen Davis Bill Armagnacq	Tony Newstead - Workplace Solutions Manager Ben Worsley - Workplace Solutions Manager Stephen Merlicek - Chief Investment Officer	
28-08-2014	Bendigo and Adelaide Bank	Peter Ormandy Mark Botten Helen Sweeney David Robertson Lisa Virgo Kasia Szulca Frank Tassone	Eddie Wasilewski - Workplace Solutions Manager Steve Merlicek - Chief Investment Officer Stephen Black - Head of Employer Super	
18-09-2014	Tronox	Roddy D'Castro - Employee Representative Graeme Dorrington - Employee Representative David Von Horn - Employer Representative Amber Thomson - HR Advisor Tony Orrell - Director, Finance Russell Austin - General Manager, Australia	Peter Mann - State Manager Employer Super Nick Villamagna - Relationship Manager	
13-10-2014	Ord Minnett	Ms J. Matthews Mr R. Cloughton Mr M. Tindale Mr M. Arthur	Jeremy Ferguson - Workplace Solutions Manager	
17-10-2014	Bell Potter Securities Limited	Gary Stranger Dean Davenport Kate Cribbes Rachel Williamson	Eddie Wasilewski - Workplace Solutions Manager	
20-10-2014	TSA Group	Matthew Hughes - Employee Representative Jessica Foo - Employee Representative Nicoletta Allia - Employer Representative Kristy Reed - Employer Representative	Peter Mann - State Manager Employer Super Nick Villamagna - Relationship Manager	Chris Rule - Tailormade Financial Strategies

Meeting Date	Corporate Plan	Employer / Employee Representatives	IOOF Representatives and invitees	Adviser
22-10-2014	Hollard Insurance	Guy Martin - Employer Rep Paul Natili - Employer Rep Maxine Cutter - Employer Rep Karen De Mol - Employer Rep Thana Geldenhuys - Employer Rep Kassie Conway - Member Rep Gregory Kitay - Member Rep Sofia Petrov - Member Rep Richard Hughes - Member Rep Brenard Grobler - Member Rep	Joshua Gaughan - Workplace Solutions Manager	Direct
24-10-2014	Mundipharma	Mr R Ingui Mr D Byers Mr T Trainer Mr P Large Ms N Keary	Jeremy Ferguson - Workplace Solutions Manager	Michael Crompton - Certe Group
05-11-2014	Amway Aust P/L	Kevin Lowe Gloria Mao Antonio Krunes Sarah Street Marites Gonzales	Joshua Gaughan - Workplace Solutions Manager	Mario Isaias - Harvest Financial Olivier Trusler - Schroders Investments Jasmine Del Villar - Schroders Investments
12-11-2014	Police Credit Union	Peter Schar Director - Employer rep David Gaskell - Employer rep Marina Gvozdeva - Member rep	Martina Townend - Business Development Officer Charles Kneale - Investment Specialist	Linda Ginever - Bridges
20-11-2014	Bendigo and Adelaide Bank	Mark Botten Frank Tassone Peter Ormandy David Robertson Michael Rosemond Pam Peterson Kasia Sczulca Lisa Virgo Helen Sweeney Mark Schultz	Eddie Wasilewski - Workplace Solutions Manager Bruce Mason – Corporate Superannuation Product Manager Stanley Yeo – Portfolio Manager, International Equities & Strategy Suzie Brown - Head of Major Accounts, TAL Life	
21-11-2014	MSA	Jenny Jackson John Kavallaris Catherine Wang	Jeremy Ferguson - Workplace Solutions Manager	David Lewis - Northbridge Financial Consulting Brendan Paddison - Northbridge Financial Solutions
11-12-2014	Crown Equipment	Michael Grogan - Employer Rep Justin Newbury - Member Rep Kyle Bate - Member Rep	Joshua Gaughan - Workplace Solutions Manager	Steve Wright - Centric Wealth