

## ABOUT BNY MELLON

BNY Mellon is a global investments company dedicated to helping its clients manage and service their financial assets throughout the investment lifecycle. Whether providing financial services for institutions, corporations or individual investors, BNY Mellon delivers informed investment management and investment services in 35 countries and more than 100 markets. As of December 31, 2014, BNY Mellon had US\$28.5 trillion in assets under custody and/or administration, and US\$1.7 trillion in assets under management. BNY Mellon can act as a single point of contact for clients looking to create, trade, hold, manage, service, distribute or restructure investments. BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation (NYSE: BK). Additional information is available on [www.bnymellon.com](http://www.bnymellon.com), or follow us on Twitter @BNYMellon.

## ABOUT NORTON ROSE FULBRIGHT

Norton Rose Fulbright is a global legal practice. We provide the world's pre-eminent corporations and financial institutions with a full business law service. We have more than 3800 lawyers and other legal staff based in more than 50 cities across Europe, the United States, Canada, Latin America, Asia, Australia, Africa, the Middle East and Central Asia.

Recognized for our industry focus, we are strong across all the key industry sectors: financial institutions; energy; infrastructure, mining and commodities; transport; technology and innovation; and life sciences and healthcare.

Wherever we are, we operate in accordance with our global business principles of quality, unity and integrity. We aim to provide the highest possible standard of legal service in each of our offices and to maintain that level of quality at every point of contact.

<http://www.nortonrosefulbright.com>

## ABOUT BNY MELLON WOMEN'S INITIATIVES NETWORK (WIN)

The Women's Initiatives Network (WIN) plays an important role in BNY Mellon's commitment to diversity and inclusiveness in the workplace, as well as, in advancing the company's overall business objectives. WIN's mission is to act as a global resource for the professional development and advancement of women who work at BNY Mellon.

WIN is open to all employees and our mission is guided by the company's core values of Client Focus, Trust, Teamwork and Outperformance. BNY Mellon firmly believes that by increasing support and professional opportunities for women and men at our company, our people will benefit, the company will benefit, and ultimately our clients will benefit.



BNY MELLON

NORTON ROSE FULBRIGHT

# WOMEN AS INVESTORS



Thursday, 12 March 2015

**Norton Rose Fulbright**

Level 18, Grosvenor Place,  
225 George Street, Sydney

WIN | INTERNATIONAL WOMEN'S DAY



## MODERATOR

### Georgina Dent

Georgina Dent is a journalist, former lawyer and a noted advocate for women's empowerment and gender equality. She is the editor of Women's Agenda, an online publication for career-minded women.

In 2005 Georgina graduated from the Queensland University of Technology with a double degree in business and law, with distinction. She was a joint recipient of the Thompson Media Law Prize in 2005.

At the completion of her tertiary studies Georgina joined Minter Ellison Lawyers in Sydney and was admitted as a solicitor in the Supreme Court of New South Wales in 2006. In 2008 she opted to tread a well-worn path from the law into journalism when she joined BRW magazine as a reporter. Whilst there she developed a keen interest in the subject of women and business, in particular, where were they all? It's a question she's been trying to answer ever since.

Having two children of her own proved to be illuminating in a practical sense around the barriers that can and do impede women's participation in the workforce. It has fuelled her determination to have Australia's problem with women and work recognised and addressed.

Given Georgina's position in agitating for change in this regard she joined Women's Agenda as the acting editor in July of 2013 and was appointed associate editor of the site in March 2014. Georgina was recognised for her advocacy around women in the inaugural Women's Empowerment Journalism Awards in Singapore earlier this year. She was a finalist in the journalist of the year category. [http://www.wejournalismawards.com/?page\\_id=1373](http://www.wejournalismawards.com/?page_id=1373)

## PANELISTS

### Pauline Vamos

Chief Executive Officer, ASFA

Pauline Vamos is the chief executive officer (CEO) of the Association of Superannuation Funds of Australia (ASFA) and has over 25 years' experience in the financial services industry.

Pauline has been CEO of ASFA since 2007, and, prior to this, was a regulator, corporate counsel, head of compliance, and strategic risk consultant, as well as a trustee director for other organisations. In 2013, Pauline was recognised as one of the 'Australian Financial Review and Westpac 100 Women of Influence'.

She is a qualified lawyer, as well as a member of the Australian Taxation Office's (ATO's) Superannuation Industry Advisory Group (SIAG), the peak superannuation consultative committee. Pauline is also on the board of the Banking and Finance Oath (BFO) group. In May 2012, Pauline was appointed to the Advisory Council for the newly established Centre for International Finance and Regulation (CIFR), an academic centre of excellence for research and education in the financial sector.

### Claire Mackay

Director, Quantum Financial

In 2014 Claire was named as Investment Adviser of the Year by Independent Financial Adviser Magazine. She was also awarded the coveted Independent Financial Adviser Excellence Award for 2014.

At 21 Claire was commissioned as an Australian Army officer. By 23 she had completed degrees in Commerce and Law. Her part time work through university involved establishing and managing of clients' self-managed super funds. By 25, Claire was admitted to the NSW Supreme Court. After university, Claire was accepted into

PwC's prestigious graduate training program. By 27, Claire was a Chartered Accountant when Macquarie Bank approached her for a role specialising in investment structuring and tax. Her clients were large institutions and high net wealth individuals structuring their investments and taxation. By 30 Claire had completed her Masters of Laws.

In 2009, Claire acquired a significant equity stake in Quantum. Her successful financial track record and media profile means she attracts like-minded successful business owners and professionals as clients. Claire is the only financial planner in Australia to hold financial planning, legal, tax, accounting & SMSF professional qualifications. In recognition of Claire's SMSF skills the ATO asked Claire to sit on their peak industry consultative body for SMSFs.

As of October 2014, Claire is also a member of the ASIC External Advisory Panel that channels senior level advice from the financial services industry to ASIC so that ASIC can gain a deeper understanding of developments and systemic risks within the financial services industry.

### Katherine Sampson

Managing Director, Mahlab Recruitment and Trustee Director, CareSuper

Katherine is the Managing Director and principal of Mahlab Recruitment (Vic) Pty Ltd, a specialist legal search and selection firm. In addition to partner and senior level search, she advises clients on mergers, strategic partner selection, law firm management and legal department structures.

Katherine is a trustee director of industry superannuation fund CareSuper and a member of its Investment and Member and Employer Services committees. She also sits on the Monash Law School Foundation board.

Former extra-curricular roles include Deputy Chair of the Walter & Eliza Hall Institute Ethics Committee, board member of the Melbourne International Arts Festival and Deputy Chair of The Australian Press Council.

Katherine is a graduate of the Williamson Community Leadership program ('Leadership Victoria') and participated in the 2020 Summit, Governance section.

She joined Mahlab after practising law at a major national firm. She holds a Bachelor of Arts with Honours and a Bachelor of Laws from Monash University and is a graduate of the AICD and the Australian Institute of Superannuation Trustees.

### Tessa Hoser

Partner, Norton Rose Fulbright

Tessa has worked in the financial services sector for over 25 years, with experience in legal, risk and product structuring sectors. She has worked in private practice and also in-house with an international bank and in a Commonwealth statutory authority.

She is a banking and finance partner at Norton Rose Fulbright and heads the firm's Australian securitisation and debt capital markets practice.

For the past 3 years Tessa has been the firm's Gender Equity Pay Auditor and she is a lead partner on Mental Health and Well Being initiatives. She is also one of the firm's risk managers.

Tessa has studied, lived and worked in the UK and Australia and is married with 3 adult children. She is a graduate of UNSW, Cambridge University and the Australian Institute of Company Directors.