CONFERENCE GUIDE
BUILDING A SUSTAINABLE FUTURE FOR THE THIRD SECTOR
Welcome to our first Adelaide Not for Profit Sector Conference. We are delighted to be hosting this event at a time of enormous change for the Australian Not for Profit sector. New regulatory requirements, the advent of social media and evolving models of corporate giving are just a few of the factors that are impacting on the way the sector operates.

Today our speakers will provide insights on how to build sustainability into your organisations, to enable you to deliver crucial services relevant to your cause or purpose, well into the future.

The Commonwealth Bank has been serving Australian communities and community organisations for a hundred years. When it comes to Not for Profit sector banking, we aim to help our customers manage cash flow; invest securely for the future; fund vital work; and demonstrate fiscal responsibility to stakeholders so that they can continue to serve the communities in which we all live and work.

We hope you enjoy today’s conference and would welcome your comments and feedback on the event; as well as your ideas on potential future topics and event formats that you’d like to see from us.

Kind regards,

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E joe.formichella@cba.com.au

Vanessa Nolan-Woods
General Manager, Education and Not for Profit Sector Banking
Commonwealth Bank
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E vanessa.nolan-woods@cba.com.au
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<td>Registration &amp; Networking</td>
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<td>30 minutes</td>
<td>9.30 - 10.00</td>
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<td><strong>Vanessa Nolan-Woods</strong></td>
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<tr>
<td>Introduction</td>
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<td>10:00 - 10:05</td>
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<tr>
<td><strong>Symon Brewis-Weston</strong></td>
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<td>Executive General Manager</td>
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<tr>
<td>Official Welcome</td>
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<td>10:05 - 10:15</td>
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<td><strong>Networking Exercise</strong></td>
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<td><strong>Michael Workman</strong></td>
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<td>Senior Economist, Institutional Banking</td>
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<td>The Economic Outlook for the Not for Profit Sector</td>
<td>30 minutes</td>
<td>10:25 - 10:55</td>
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<td><strong>Jenny Holliday</strong></td>
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<td>Getting the Best from your Board</td>
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<td>30 minutes</td>
<td>10:55 - 11:25</td>
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<td><strong>Morning Tea</strong></td>
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<td>15 minutes</td>
<td>11.30 - 11.45</td>
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<td><strong>Networking Exercise</strong></td>
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<td><strong>Natasha Greenwood</strong></td>
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<td>New Models of Corporate Philanthropy</td>
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<td>20 minutes</td>
<td>11:55 - 12:15</td>
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<td><strong>Linda Lavarch</strong></td>
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<td><strong>Andrew Sealey</strong></td>
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<td>Not for Profit Sector Reform Update and Panel Q&amp;A</td>
<td>50 minutes</td>
<td>12:15 - 1:05</td>
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## Lunch

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| 1:05 - 1:35 | **Nick Moraitis**<br>
*Founder and Senior Associate Director*<br>Make Believe<br>Centre for Australian Progress | 40 minutes | Peer Based Fundraising Success - The Live Below the Line Experience |

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| 1:35 - 2:15 | **David Tagg**<br>
*Head of Wholesale Investments and Not for Profits*<br>Commonwealth Bank | 30 minutes | Investing for Sustainability |

## Networking Exercise

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<td>2:45 - 2:55</td>
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## Afternoon Tea

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| 2:55 - 3:10 | **Michael Haydon**<br>
*Partner, Audit and Assurance, Risk Advisory*<br>BDO | 30 minutes | Identifying and Preventing Fraud in Not for Profits |

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| 3:40 - 4:10 | **Kylea Tink**<br>
*CEO*<br>McGrath Foundation | 30 minutes | The McGrath Foundation Journey |

## Networking Exercise

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<td>4:10 - 4:15</td>
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## Official Close and Lucky Door Prizes

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| 4:15 - 4:30 | **Joe Formichella**<br>
*General Manager, Corporate SA/NT*<br>Commonwealth Bank | 15 minutes | Official Close and Lucky Door Prizes |
SPEAKER BIOGRAPHIES

JOE FORMICHELLA
GENERAL MANAGER, CORPORATE SA/NT
COMMONWEALTH BANK

Joe Formichella is currently leading the SA/NT Corporate Financial Services team as General Manager. Joe’s team includes 80 professional staff with geographical locations across the CBD, Mawson Lakes, Darwin and Winnellie.

Joe has succeeded in growing the SA/NT business each year. Joe has had a significant impact on the SA/NT business over the past six years, leading the team through tremendous change and evolution. This successful growth was achieved through a firm strategic plan and being performance driven.

Joe has 28 years banking experience, including leading business development teams within other major banks and a successful career as a banker for some of Adelaide’s most prominent businesses.

Joe holds a Bachelor of Economics from Flinders University, a Bachelor of Business with a Major in Accounting from University of South Australia and is currently undertaking an MBA at Adelaide University.

Joe is married with two children and enjoys golf and triathlons.
Vanessa is the General Manager of the Not-for-Profit Sector Banking business at the Commonwealth Bank and brings 20 years of experience to her role focused on creating and growing customer-centric businesses and service propositions.

Vanessa has come full circle, having started her career at Commonwealth Bank through the graduate program, moving quickly into management roles within Corporate and Agribusiness Banking and Industry Specialisation. Prior to taking up her current position at the Commonwealth Bank, Vanessa spent ten years at Westpac in a variety of senior roles, including founding and leading Westpac’s Social Sector Banking business and subsequently heading up a business-critical program to reward customer loyalty and build advocacy.

Vanessa holds a Bachelor of Commerce in Economics and Management and has served on the board of the Women’s Leadership Institute of Australia. She grew up working on her family farm in the Riverina, giving her an appreciation of the importance of a strong community, which she demonstrates in her passion for enabling Non Profit organisations to build and serve vibrant communities.
Symon Brewis-Weston  
EXECUTIVE GENERAL MANAGER,  
CORPORATE FINANCIAL SERVICES  
COMMONWEALTH BANK

Symon is the Executive General Manager of CFS following two years as Executive General Manager for Local Business Banking from March 2008 to August 2010.

Prior to this Symon was the President Director of the Commonwealth Bank’s Indonesian subsidiary. During his time in Indonesia, Symon was responsible for completing an acquisition and merger of a bank and life company and ensured the bank became the top bank in Indonesia for customer service.

Symon also worked in China developing the Commonwealth Bank’s Chinese banking strategy. Symon has spent time working in Project Finance and Agri-Project Finance, is a trained economist, and holds a degree in Economics (Hons) and a Master of Applied Finance.

In his off time, Symon enjoys remote fly fishing, parenting and keeping fit.

Michael Workman  
BEC (HONS) LLB  
SENIOR ECONOMIST,  
INSTITUTIONAL BANKING & MARKETS  
COMMONWEALTH BANK

Michael is a Senior Economist with CBA Global Markets Research. He is responsible for developing and communicating the bank's views on trends in the Australian and International economies as well as the likely effect on interest rates and currencies.

Michael joined the Commonwealth Bank after working in the New South Wales Treasury and other financial corporations. He was also an investment analyst with the NSW Government’s superannuation investment group.

Michael takes a particular interest in Australia’s regional and sectoral growth issues. He has been actively involved in financial markets for 25 years.
Jenny has been involved in the sporting and non-profit industries for over 20 years, serving on a number of boards as well as being the CEO for an environmental charity.

Jenny was the Executive Director of the Victorian Olympic Council and most recently a Director at the Australian Sports Commission. Formerly Jenny has been a program manager at Ernst & Young and was a professional softball player in Japan.

In her spare time Jenny still plays softball as well as volleyball and her key project at home is making the family farm self-sufficient.

Matrix on Board strives to bring the best of the commercial world, such as technology, financial intelligence and good governance to the non-profit sector but within the context of a deep understanding of how non-profits work.

Linda Lavarch currently holds the positions of Chair of the Federal Government’s Not-For-Profit Sector Reform Council and Chair of the Not-For-Profit Tax Concession Working Group. The NFP Sector Reform Council and its working groups provide high level advice to the Federal Government in respect of the government’s NFP Sector reform agenda.

Linda is a Research Fellow at the Australian Centre for Philanthropy and Nonprofit Studies at QUT where she is currently co-ordinating a Nonprofit Model Law research project.

As a former State Member of the Queensland Parliament, Linda served as Queensland’s Attorney-General. She currently serves as a Director on the Board of the Australian Cervical Cancer Foundation and is Chair of Board of the Coast2Bay Housing Group, a not-for-profit social and affordable housing company.
Natasha Greenwood is currently leading a team of Relationship Executives at the Commonwealth Bank. Natasha has had a varied and dynamic career with Commonwealth Bank, working across both the Corporate and Retail Banks. Natasha has enjoyed roles ranging from corporate lending, credit assessment, and senior leadership in relationship and sales management.

Natasha has a passion for both banking and customer service, particularly in SA, and enjoys leading her team of experienced finance professionals that are focused on delivering excellent customer service. Natasha’s goal is to deliver to our clients what they need, when they need it, getting it right the first time.

In addition to her corporate life, Natasha is also a hands-on mum to her three boys. She knows the challenges of finding work / life balance and shares her experiences through her mentoring network.

More recently Natasha has become involved with The Hunger Project and she enjoys sharing with others the story of this leading and dynamic NFP and the way it engages with women in particular.

Natasha enjoys bushwalking and camping and has previously sat on the board of YWCA Canberra chairing the Finance Committee.

Natasha has participated in various committees at several independent schools and has been instrumental in establishing financial literacy programmes. Natasha is passionate about educating our young people, leadership and engaging with the broader community.
ANDREW SEALEY
DIRECTOR OF COMPLIANCE
ACNC

Andrew is a qualified lawyer with extensive legal, compliance and regulatory experience. Andrew brings a unique strategic lens to the ACNC, having operated as a regulatory and compliance lawyer in both the private sector (NAB, PwC, Freshfields) and public sector (ASIC, Qatar Financial Centre Regulatory Authority) developing strong legal, regulatory and compliance experience in a number of countries (Australia, New Zealand, UK, Europe, Middle East and Asia) and across a number of industries.

Andrew has deep experience in the development of regulatory regimes and in the exercise of formal regulatory powers, including undertaking enforcement and compliance activities for the Australian Securities and Investments Commission. Andrew has a genuine passion for the charities and not-for-profit sector and his work as a senior compliance manager for NAB and as a regulatory consultant for PwC ensures he will bring an empathetic and commercial approach to regulation.

KYLEA TINK
CEO
MCGRATH FOUNDATION

As Chief Executive Officer for the McGrath Foundation, Kylea is responsible for ensuring all the Foundation’s activities continue to work towards realising Jane, Glenn and Tracy’s original visions for the provision of support to women with breast cancer and their families right across Australia and for increased breast awareness in younger women.

Having spent the last 15 years working in roles covering the areas of health, education, health care provision, product management, media management, communication strategy and execution and having grown up in regional NSW, Kylea brings a wealth of experience and a passionate commitment to the Foundation.

In June this year, the McGrath Foundation reached a milestone, funding its 75th breast care nurse – half way to its goal of funding a breast care nurse for every family experiencing breast cancer. It achieved this in just four years through garnering enormous support from Australian communities.
Nick has spent 12 years working at the forefront of social change communications in New York, Toronto, London, and Sydney. In 2001, Nick helped found TakingITGlobal.org, one of the world’s first social networks, where he crafted partnerships with eight UN agencies.

In 2005, Nick joined Amnesty International in London where he worked with senior directors and the international board to craft new global strategies around youth engagement, digital, and internet censorship issues.

Returning to Australia, Nick played a pivotal role in the growth of GetUp as their first online and outreach director, before spending a year managing Greenpeace’s public engagement work for Australia and the Pacific.

In 2009, Nick co-founded Make Believe. Nick led Make Believe’s work with dozens of Australia’s leading social and environmental causes – including advising on winning political campaigns, organisational re-structures, and hundreds of creative projects across every medium. Nick is now primarily focused on the establishment of a new national non-profit organisation, the Centre for Australian Progress.

Nick has twice served as a member of the Australian Government’s delegation to the UNESCO General Conference, coordinated a range of civil society activities at 20 other UN meetings, and spoken at more than 40 international conferences. He is a recipient of the Australian Leadership Award and the author of “Cyberscene” (Penguin), and a board member of the Australian Youth Climate Coalition.
Michael commenced employment as a graduate accountant with BDO in 2001 after experience with a financial institution. During his time at BDO Michael has worked with clients across a range of business sectors.

In his role as Partner at BDO, Michael is responsible for a large number of audit assignments including allocating and supporting staff so as to maintain both the quality of BDO’s service and technical capability. Michael’s experience is broad-ranging extending from the carriage of the audit of a large manufacturing business near Manchester in the UK, to addressing demanding accounting disclosure issues in relation to the financial reports of listed companies.

BDO was established as an association of firms in Australia in 1975. Today, it is one of Australia’s largest associations of independently owned accounting practices, with offices in Adelaide, Brisbane, Cairns, Darwin, Hobart, Melbourne, Perth and Sydney.

BDO has carried out four biennial Not-For-Profit Fraud Surveys, the most recent early in 2012. The results of this survey, combined with the information from previous surveys, provides an important benchmark for not-for-profit organisations by revealing the perception and level of fraud in the sector, examining specific incidences of fraud, and highlighting the measures the sector is using to prevent fraud.

David has worked in financial services for 23 years. Prior to his position at Commonwealth Bank David was Director of Institutional Business at Societe Generale Asset Management. David has qualifications in Finance and Applied Finance, is a Fellow of ASFA, and is presently completing a Masters of Applied Finance. David brings the Bank extensive experience working with many of the country’s largest investors.

David is responsible for the management of the Commonwealth Bank’s Wholesale Investments business unit nationally. David works with Commonwealth Bank’s Wholesale Advisers and their client corporations and institutions, with a particular emphasis on the Not For Profit sector.

MICHAEL HAYDON
PARTNER, AUDIT AND ASSURANCE, RISK ADVISORY
BDO

DAVID TAGG
HEAD OF WHOLESALE INVESTMENTS AND NOT FOR PROFITS
COMMONWEALTH BANK

David has worked in financial services for 23 years. Prior to his position at Commonwealth Bank David was Director of Institutional Business at Societe Generale Asset Management. David has qualifications in Finance and Applied Finance, is a Fellow of ASFA, and is presently completing a Masters of Applied Finance. David brings the Bank extensive experience working with many of the country’s largest investors.
WE CAN HELP YOU MAKE AN EVEN BIGGER DIFFERENCE

We know that the work you do as a not-for-profit organisation isn’t just important. It can be life or world-changing. That’s why we have dedicated Relationship Executives who specialise in not-for-profits and can tailor banking services to drive efficiencies and uncover value. If you’re in the business of helping, we’d like to help you. Contact one of our NFP Relationship Executives to see what we can do for your organisation.

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