

**Quantum
Financial**

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2017 Investor Seminar
Trump, Transferring wealth & Technology

Australia's most awarded financial planning practice



The Sebel

37 Victor Street Chatswood NSW 2067
Friday 17 November 2017

LIMITED SEATING!

Date & time

Friday 17 November 2017
9:30 Registration – 1:30 Close

Investor Seminar

RSVP by Monday 23rd October
e: clients@quantumfinancial.com.au



Agenda

Your MC for the Investor Seminar - Emma Alberici

9:30am	Registration
10:00am	Welcome Claire Mackay Quantum Financial
10:05am	Trump – Markets & investments Emma Alberici ABC TV Mark Wills State Street Global Advisors Tim Mackay Quantum Financial
10:50am	Transferring family wealth Emma Alberici ABC TV Claire Mackay Quantum Financial
11:35am	Technology & philanthropy Emma Alberici ABC TV Julie Vonwiller Appen Chris Vonwiller Appen
12.15pm	Closing remarks Tim Mackay Quantum Financial
12:20pm	Light lunch served
1:30pm	Close



**Emma
Alberici**

Emma Alberici has been a host of Lateline since 2012. Before that she spent four years as the Europe Correspondent for the ABC based in the UK.

Emma was previously the Finance Editor of 7.30. Before joining the ABC, Emma spent nine years at the Nine Network after completing her cadetship at News Limited's Herald Sun Newspaper (Melbourne).

Emma has been a finalist three times in the Walkley Awards for journalistic excellence and is the author of three editions of The Small Business Book published by Penguin.



**Claire
Mackay**

Claire Mackay is Principal and Head of Advice at Quantum Financial. She is one of the most highly regarded advisers in the Australian investment industry with multiple awards.

Previously Claire worked at Macquarie Bank & PwC. Claire is a director of the Accounting Professional & Ethical Standards Board & member of ASIC's External Advisory Panel.

Claire is a Certified Financial Planner, Chartered Accountant, Certified Practising Accountant, Chartered Tax Adviser, is a Graduate member of the AICD. She holds a Bachelor of Commerce and Bachelor of Laws (Macquarie) and a Master of Laws (Sydney).



**Mark
Wills**

Mark Wills is a Managing Director of State Street Global Advisors (SSGA) and Head of the Investment Solutions Group, Asia Pacific. He is responsible for developing and implementing tactical and strategic multi asset class solutions for institutional clients. Mark joined SSGA in August 2011.

Previously Mark worked at Goldman Sachs JBWere in Australia, where he held a number of roles, most recently as an Executive Director in Transition Management. Prior to that role he worked in Equity Derivatives.

Mark holds a Bachelor of Economics (Macquarie) and a Masters of Business in Applied Finance (UTS).



**Tim
Mackay**

Tim Mackay is Principal and Chief Investment Officer at Quantum Financial. Tim has over 20 years experience in private wealth management. He is nationally recognised as one of Australia's top 50 financial advisers by Barron's in 2017; SMSF Advisor of the Year in 2014 and the Excellence in Business Ethics Award in 2012.

Tim was formerly a sell side equity analyst at Deutsche Bank, UBS and HSBC in London, New York and Sydney.

Tim is a Fellow of Chartered Accountants Australia and New Zealand, a Certified Financial Planner, Chartered Accountant, a SMSF Specialist Advisor. He holds a Bachelor of Economics (Hons) (Sydney) and an MBA (London).



**Dr Julie
Vonwiller**

Dr. Julie Vonwiller is recognised as a linguistics expert and was working at Sydney University before she founded Appen Limited in 1996, a speech and text recognition technology company. Julie has pioneered the development of speech science and technology for more than 20 years.

Julie, with Chris, received an Innovation Hero award in 2007 from The Warren Centre for Advanced Engineering; Appen received the Inaugural Prime Minister's Exporter of the Year Award in 2008; and Julie received the Alumni Award for Distinguished Service from Macquarie University in 2008.

Julie is a member of Sydney University's STEM advisory board.

Julie holds a Bachelor of Arts (Hons), and a PhD in linguistics (Macquarie).



**Chris
Vonwiller**

Chris Vonwiller is a founder and Non-Executive Chairman of Appen Limited (ASX:APX) and served as CEO from 1999 to 2010. Previously Chris held senior executive positions at Telstra and has over 30 years in senior management and board roles in communications and IT.

Chris was a foundation board member of Intelsat Limited; Chairman of The Warren Centre of Advanced Engineering (Sydney), and Chairman and President of the Pacific Telecommunication Council.

Chris is a Fellow of Engineers Australia and the Australian Academy of Technology and Engineering. He holds a Bachelor of Engineering (Hons) and Bachelor of Science (Sydney) and an MBA (Macquarie).