Strength in numbers.

Your experienced Sales and Distribution team of Westpac Institutional Bank.

The Team

Years of experience

Westpac Institutional Bank's Sales and Distribution team specialise in providing investment products to retail and wholesale investors through advisers.

In December 2008, Westpac merged with St.George Bank meaning that our business has grown to offer a deeper choice of products & brands to help investors grow their wealth:

- BT Margin Lending
- St.George Margin Lending
- Bank SA Margin Lending
- BT Managed Accounts
- Westpac interest rate products
- Westpac structured products
- Westpac Online Investing

Please feel free to contact our team to see how we can help you help your clients.

Who to contact

Communications matrix

Head of Sales Distribution	Craig Keary
NSW	Ryan Evans
	Peter Foster
	Ken Jackman
	Staten Janes
	Barry Summers
Queensland	Simon Godfrey
	Travis Grant
	Stewart Thalon
South Australia	Romeo Kojic
	Steve Miller
Victoria	Derek Bennett
	Mike Smith
Western Australia	Romeo Kojic
Key Accounts	Jeremy Dean
	Jay Pottenger
	Jane Schaeffer
	Paul Roach

- Sales & Distribution State Managers
- Business Development Managers
- Sales Support
- Key Accounts Team

Craig Keary

Head of Sales & Distribution

With over 20 years experience in the international and domestic financial services industry, Craig has been with us since October 2007. Previously the General Manager of Geared Investments at Commonwealth Bank and head of HSBC Stockbroking, he has worked in London, Johannesburg and Asia. A previous Chair of the Securities and Derivatives Industry Association Direct Broking Group and the Conference Committee, Craig has also held senior positions on key advisory boards.

Craig has completed a Post Graduate Diploma in Management at Macquarie Graduate School of Management and is a graduate of the Mt Eliza Business School Leadership Development Program and the Australian Graduate School of Management General Manager Program. He is also a Master Stockbroker of the Securities and Derivatives Industry Association (MSDIA), a Fellow of the Australasian Institute of Banking and Finance (FAIBF) and a Member of the Australian Institute of Company Directors (MAICD). He is also a Fellow of the Australian Institute of Management (FAIM) and is an affiliate member of the Financial Planning Association.

Today, Craig leads our specialist sales team expanding distribution channels and enhancing product development. He brings a deep understanding of international Financial markets and investment products and strategies to our clients.

20 YEARS

Craig Keary

02 8253 1225

ckeary@westpac.com.au

Ryan Evans

NSW State Manager

With over 15 years experience in the financial services industry, Ryan joined Westpac in April 2008. With a career spanning funds management, equity lending and debt capital markets, Ryan holds a Bachelor of Business from UTS, is an ASX Accredited Derivatives Adviser, has completed the Diploma of Financial Planning 1-4 and holds a Masters of Finance from Macquarie University.

Ryan is responsible for sales and development in NSW for all Westpac investment products and is a Key Account Manager for certain accounts.

15 YEARS

Ryan Evans

02 8254 4694

ryanevans@westpac.com.au

Peter Foster

NSW Business Development Manager

With over ten years of experience in the banking and financial services industry, Peter previously worked for MLC, BT Financial Group and Macquarie Bank. He joined St.George Margin Lending, now part of Westpac, in August 2007 as a Business Manager.

Peter holds an Honours Degree in Science and a Diploma of Financial Planning.

Peter is currently NSW Regional Manager for St.George Margin Lending, and is also responsible for acquiring and maintaining relationships with financial planning firms located in Sydney's CBD.

10 YEARS

Peter Foster

02 9236 2258

fosterpe@stgeorge.com.au

Staten Janes

NSW Business Development Manager

Staten has over 10 years experience within the banking and finance industry, having held various roles with MLC / NAB including Account Management for Retail and Corporate Super.

Staten joined the St.George group in January 2004 and also held various roles within Asgard, including Business Migration Consultant for Asgard Capital Management and Business Implementation Manager for regional NSW. He joined us in the Margin Lending distribution team in August 2007.

Today, as well as having completed his studies in Business Management, ASFA100 and a Diploma in Financial Services, Staten is responsible for servicing the northern NSW region.

10 YEARS

Staten Janes

02 9236 1962

janess@stgeorge.com.au

Ken Jackman

NSW Business Development Manager

Ken has enjoyed a career with Westpac for over 16 years, gaining extensive experience across many facets of retail banking.

In July 1999 Ken joined BT Financial Group as a member of BT Margin Lending and has since worked in a number of roles, including both Product and Sales Manager. Ken also worked in a sales capacity as a Margin Lending Specialist, focusing on the needs of Westpac Private Bank as well as other direct High Net Worth customers.

In October 2007, Ken joined us in the Retail Distribution team, where he continues to provide solutions to Westpac Private Bank, particularly in the specialist area of margin lending.

Ken is currently studying a Diploma of Financial Planning.

16 YEARS

Ken Jackman

02 8253 2452

ken.jackman@btfinancialgroup.com

Barry Summers

NSW Business Development Manager

Barry has over 10 years experience in the financial industry, predominantly with St.George and in the UK with JP Morgan Asset Management and State Street Bank.

Barry recently moved across to Westpac having previously been a Business Manager with St.George Margin Lending. He has completed his Diploma of financial planning and is now studying for a Masters of Applied Finance.

Today, Barry is responsible for growing adviser and broker participation across the entire range of our investment and margin lending products.

10 YEARS

Barry Summers

02 8253 1225

bsummers@westpac.com.au

Simon Godfrey

QLD State Manager

With over 25 years experience in financial services, Simon was originally based in London for 18 years where he was responsible for managing the sales of Offshore Investments and Corporate and International Employee Benefit solutions to the UK & European financial adviser network. Before joining Westpac Simon was Head of Investment Lending Sales at CBA/Colonial.

Simon is a Senior Associate of the Australian & New Zealand Institute of Insurance and Finance (ANZIIF), a Certified Insurance Professional (CIP) holds a Master Stockbroker designation with the Securities & Derivatives Industry Association (SDIA) and is a member of the Chartered Insurance Institute (CII) in the UK. Simon also has full financial planning qualifications covering both the UK and Australia. In addition to this he has a Certificate in Corporate Business Development through Nottingham University and is currently studying Risk Management through ANZIIF.

Simon joined us in 2008 to help build WIB's Retail Distribution capability in Queensland.

25 YEARS

Simon Godfrey

07 3227 2702

sgodfrey@westpac.com.au

Travis Grant

QLD Business Development Manager

With twenty years experience in the financial services industry, Travis joined us from St.George Margin Lending in December 2007 as Queensland Regional Manager.

Prior to this, Travis was part of Adelaide Bank's Key Account Management team – becoming the Sales Manager for the bank's Sales and Distribution Team. He was responsible for distributing margin lending, structured and retail funding products.

Travis has also worked at BT where he managed the Client Executive Group within BT Wrap.

Today, Travis is the QLD Regional Manager for St.George Margin Lending and is also responsible for growing adviser and broker participation across the entire range of our investment and margin lending products.

20 YEARS

Travis Grant

07 3232 8825

grantt@westpac.com.au

Stewart Thallon

QLD Business Development Manager

Stewart's experience in financial services spans over 11 years, a large proportion of which was spent as a financial adviser, where he was exposed to every facet of the planning industry. Stewart joined Westpac in January 2009 having previously worked for CBA/Colonial.

Stewart holds a Graduate Diploma of Financial Planning with the Securities Institute of Australia, the Master Stockbroker designation with the Securities & Derivatives Industry Association (SDIA) and is a Fellow member of the Financial Services Institute of Australasia (FINSIA). He is accredited to give advice on Self Managed Super Funds (SMSF) and is currently studying to become ASX Accredited Derivatives Advisers Level 2 (ADA).

Today, Stewart is responsible for growing adviser and broker participation across the entire range of our investment and margin lending products.

11 YEARS

Stewart Thallon

07 3227 2428

sthallon@westpac.com.au

Romeo Kojic

WA State Manager

Romeo has been in financial services for 14 years, having previously worked at Macquarie and CBA.

He has a Diploma of Financial Planning, is an accredited derivatives adviser, and is about to begin his MBA.

Romeo joined Westpac in February 2008 and specialises in working with financial advisers and brokers in delivering solutions to their clients, managing the Western Australian and South Australian regions.

14 YEARS

Romeo Kojic

08 9426 2281

rkojic@westpac.com.au

Steve Miller

SA Business Development Manager

With over 31 years of experience in the banking and financial industries, Steve is part of the team at BankSA and has held various sales and operational management positions, primarily in intermediary markets.

A member of BankSA's Private Bank team, Steve is RG146 compliant (SDIA) and is currently studying a Diploma in Financial Planning. Steve is also a Justice of the Peace.

Today, Steve specialises in working with BankSA's valued business partners in the South Australian and Northern Territory regions across both BankSA margin lending and other Westpac investment products.

31 YEARS

Steve Miller

08 8424 5505

millerste@banksa.com.au

Derek Bennett

VIC State Manager

Derek has over 20 years experience in the Finance Industry, having spent the previous ten years working with High Net Worth Advisers and clients in stockbroking at UBS and Merrill Lynch. Before this, Derek was the National Manager of Private Superannuation at Perpetual Trustees and spent five years both with State Street Global Advisers and National Australia Bank.

Derek has a Bachelor of Arts (Politics and Economics) from the University of Melbourne and is RG146 accredited by the Securities and Derivatives Industry Association (SDIA).

Today, Derek is responsible for sales and development in Victoria for all Westpac investment products.

20 YEARS

Derek Bennett

03 9608 4302

dbennett@westpac.com.au

Mike Smith

VIC Business Development Manager

Mike has 7 years experience as a Financial Planner with AMP and Westpac.

A Business Manager with St.George Margin Lending since April 2005, he was promoted to Regional Manager for VIC, TAS, NT and WA in 2007.

Mike has a degree in Economics from the University of New England and formerly attained the rank of Senior Constable with the NSW Police Force.

Today, as a Regional Manager, Mike is responsible for the distribution of St.George Margin Lending and other Westpac investment products in VIC, TAS and WA.

7 YEARS

Mike Smith

03 9274 4713

smithmi@stgeorge.com.au

Jeremy Dean

Head of Key Accounts

Prior to joining Westpac in February 2008, Jeremy worked at Macquarie Bank and Citigroup in sales management roles. His qualifications include a Bachelor of Business Studies from Charles Sturt University and a Diploma of Financial Markets. Jeremy is an ASX Accredited Derivatives Adviser and is currently studying a Masters of Applied Finance from Macquarie University.

Jeremy heads up our Key Accounts team, with responsibility for building and managing strategic relationships with key clients.

11 YEARS

Jeremy Dean

02 8254 8922

jerdean@westpac.com.au

Jay Pottenger

Key Accounts Manager

Jay joined Westpac Equities in April 2009 from St.George Margin Lending, where he spent two years as a Business Manager. Jay has also held positions at Deutsche Bank in London and the Treasury department at IMB.

Jay holds a Bachelor of Commerce from the University of Wollongong majoring in Economics and Finance, has completed his Diploma of Financial Planning and will be commencing an MBA shortly.

As part of the Key Accounts team, Jay's role includes developing external distribution channels – specifically working with financial planning and broking firms.

8 YEARS

Jay Pottenger

02 8254 4056

jpottenger@westpac.com.au

Jane Schaeffer

Associate Director, Retail Distribution

Jane has over 15 years experience in Financial Services predominately in a sales capacity working with advisers and dealer groups.

Jane joined Westpac in 2004 as BT's National Margin Lending Specialist, a role that provided technical sales support for geared products to advisers, dealer groups and other sales channels across the BT Financial Group. In January 2008, Jane moved into the Westpac Equities Sales and Distribution team as a Key Account Manager and has more recently transitioned into a newly created role in Communications and Projects.

Jane holds a Bachelor of Business degree in Accounting & Marketing from the University of Technology, Sydney and has completed ASX accreditation in Derivatives and Diploma of Financial Services (RG146).

15 YEARS

Jane Schaeffer

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jane.schaeffer@btfinancialgroup.com.au

Paul Roach

Sales Support Manager

Paul joined Westpac in April 2009 from St.George Margin Lending, having spent two years there as an Account Manager to High Net Worth clients and in Sales Support. Paul has previously held roles with Macquarie Bank within Securitised Lending and Deutsche Bank in London.

Paul has a Diploma of Financial Markets and is currently studying a Diploma of Financial Services (Financial Planning).

Today, Paul is the Sales Support Manager for Westpac Retail Distribution, supporting the team nationally across all products.

6 YEARS

Paul Roach

02 8254 1240

paulroach@westpac.com.au

We're constantly exploring new investment opportunities. If you would like to find out more about our research findings and receive economic commentary by subscribing to our daily and monthly email service, please contact:
equitysales@westpac.com.au

249+
YEARS OF EXPERIENCE.

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