

## JBWere Philanthropic Services — Experience where it counts

Since 2001, we have been helping individuals, families and businesses develop and implement strategic philanthropic goals that meet their particular needs. We work with non-profit clients and provide insights and advice on governance, how to maximise investment outcomes and how to appeal to donors.

We regularly conduct and compile research and best practice in the non-profit space and share these findings with our clients. We also present capacity-building seminars and events, which provide educational opportunities for non-profit staff and board members.

As a team we are committed to contributing to the ongoing development of the philanthropic and the non-profit sectors in Australia and New Zealand.

### Meet the Philanthropic Services team



#### **Christopher Thorn**

Executive Director, Philanthropic Services

Christopher is the Executive Director of the firm's Philanthropic Services team, where his primary responsibilities include raising awareness of philanthropic issues, providing advice on investment and capital management to individuals and organisations wishing to implement a philanthropic strategy, and fostering relationships between interested parties in order to facilitate the giving process. Christopher has a long term interest in social finance and has participated in and hosted roundtables and forums on this topic. He also oversees research by JBWere's Philanthropic Services.

Christopher joined JBWere in 1984 and worked in Melbourne as a Retail and Institutional Adviser. In 1993 Christopher moved to New York as Vice President Institutional Sales. Upon returning to Australia in 1996 he was appointed Manager of JBWere's Queensland business, until returning to Melbourne in 2001. He was made a partner of JBWere in 1997.

Christopher has held a variety of senior management roles within JBWere's Private Wealth Management business, including business integration and strategy. In 2002, Christopher established the firm's Philanthropic Services division.

Christopher is a member of the Philanthropy Australia Council, Chairman of ShareGift Australia, the MLC Community Foundation Advisory Committee and the JBWere Charitable Endowment Fund Investment Committee, President of the Camberwell Grammar School Foundation and a member of the Centre for Social Impact Melbourne Advisory Council.



#### **Tim Hardy**

Director, Philanthropic Services

Tim joined the Philanthropic Services team in May 2010 from NAB Private Wealth. He provides advice to philanthropic and non-profit clients with a specific focus on developing relationships through JBWere Philanthropic Services and NAB Private Wealth including National Australia Trustees. His primary role is to support the broader businesses of NAB in client philanthropy.

Tim worked as a fixed interest fund manager in London for 8 years and later marketed institutional funds management to superannuation and charity clients in Australia.

Tim has worked in the philanthropy sector for 10 years, and ran his own philanthropy consulting business for three years, before joining NAB Private Wealth in 2008 as Head of Client Philanthropy.

Tim sits on the Investment Committee of the Fundraising Institute of Australia and previously sat on the boards of Volunteering NSW and the National Children's Youth and Law centre.



#### **David Knowles**

Director, Philanthropic Services

David joined the Philanthropic Services team in March 2010. He has considerable experience of philanthropy in Australia, particularly through his role as a strategic adviser to individuals, families, charities, and other non-profit institutions. One of his primary responsibilities at JBWere is to provide strategic advice to charitable and non-profit organisations in relation to their governance, capacity building and donor relations activity. David works in partnership with JBWere advisers to develop investment management solutions that are appropriate to the particular circumstances of their charitable and non-profit clients.

Prior to joining JBWere, David worked for Perpetual Private Clients as Head of Philanthropy, and prior to that as Head of Specialist Services. David also chaired Perpetual's Trust Investment Committee, which oversaw investment of charitable funds managed by Perpetual as trustee. During his time at Perpetual, David also helped establish over 40 Private Ancillary Funds and numerous Charitable Endowment Funds. As a result, David is well-equipped to provide advice in relation to setting up or donating to a charitable foundation.

David's 20 year career in financial services also includes 5 years offshore experience working for Merrill Lynch's intergenerational wealth management business and 5 years working for English private bank Coutts & Co, assisting wealthy clients with their banking, investment and estate planning needs.



### **Jim Whineray**

Senior Adviser, Philanthropic Services

Jim has been with JBWere since 2004 and joined the Philanthropic Services team in August 2010.

Prior to joining JBWere, Jim worked in a number of senior corporate financial roles at Carter Holt Harvey for over 11 years.

Jim's role at JBWere is to raise awareness of philanthropic issues and introduce the specialist skills of the Philanthropic Services team to the New Zealand market. He works as a specialist resource that can be used by the JBWere business in New Zealand to service this market.

Jim holds a Bachelor of Commerce in Economics from Otago University and a Post Graduate Diploma in Business (Finance) from the University of Auckland. Since joining JBWere, he has become an NZX Adviser, Futures and Options Adviser and accredited ASX Derivatives Adviser.



### **Chris Wilson**

Associate, Philanthropic Services

Chris joined JBWere in April 2007. He is responsible for researching and analysing trends in the non-profit sector, driving and supporting new initiatives and exploring opportunities for adding value to our clients.

Before joining the Philanthropic Services team, he held both technical and management positions supporting JBWere's sophisticated investors through the provision of detailed portfolio analysis and investment tools.

Chris received a Bachelor of Business – Economics and Finance (RMIT) and has completed a Masters of Commercial Law (Deakin University).



### **John McLeod**

Research Consultant, Philanthropic Services

John joined the Philanthropic Services team in 2002 after 16 years in resource equity markets at the firm. His primary responsibilities include researching and analysing trends in the philanthropic sector; interpreting the findings to provide valuable insights for clients. He has completed the newly established Swinburne University postgraduate course in Philanthropy and Social Investment.

John joined the firm in 1987 following a successful career in mining engineering with MIM and Esso Australia and was responsible for research into BHP (now BHP Billiton) and the energy sector. He was appointed Resource Strategist and Manager of Resource Research within the firm's top-ranking strategy team.

Since retiring as a Partner of the firm in 2003, John has been able to devote more time to both his family's interests in private philanthropy and in a broader education role through Philanthropic Services.

John retired from full time employment in 2009 and now works as a research consultant to the Philanthropic Services team.



### **Bianca Moore**

Analyst, Philanthropic Services

Bianca joined JBWere in 2000. She held a business development role within JBWere's Private Wealth Management business, working with Advisers in the area of managed products. In 2003 she joined the Philanthropic Services team and is currently administering the JBWere in the Community program which encompasses Workplace Giving, staff volunteering and the coordination and implementation of other initiatives with our charitable partners.

Bianca has completed a Bachelor of Arts (Psychology/Criminology) at The University of Melbourne and a Master of Social Science (International Development) at RMIT.



### **Jackie Whyte**

Executive Assistant, Philanthropic Services

Jackie joined JBWere in May 2010. She is responsible for supporting the Executive Director, Philanthropic Services and the Philanthropic Services Team in the performance of their functions.

Jackie has gained most of her experience in asset management and private equity, having worked for Ernst & Young and Jupiter Asset Management. Prior to joining JBWere, Jackie worked for Mind Australia, a non-profit provider of mental health services across Victoria and South Australia.

Jackie relocated to Australia from the UK in January 2009. She studied psychology at the University of Dundee and completed a Diploma in Office Studies and Technology at Mackworth College, Derby.