



F&P
FUNDRAISING & PHILANTHROPY

GENEROSITY FORUM 2019

PHILANTHROPY INSPIRATION • BEST PRACTICE • CHANGEMAKERS

3 May • Swissôtel Sydney • fpmagazine.com.au/genforum2019

WELCOME

Inspiration, insight, best practice and case studies in Australian philanthropy.

The *Generosity Forum* aims to keep the philanthropic community up to date with new developments, learnings from case studies, and a dash of inspiration.

Whether you're a donor, funder, advisor, social entrepreneur, member of a collective giving group

or community foundation, administrator of a trust/foundation, or charity or nonprofit executive, the forum will help you understand how the giving landscape is shifting.

Speakers and panellists include some of Australia's leading donors, funders and industry experts.

PROGRAM HIGHLIGHTS

The following speakers and sessions are just some of those that will be sharing their knowledge and expertise at the 2019 *Generosity Forum*. Keep an eye on the forum website fpmagazine.com.au/genforum2019 for the updated full program.

THE RISE OF ASIAN PHILANTHROPY IN AUSTRALIA

Since the migration of Chinese people to the Victorian goldfields in the 1850's, the growth and influence of Asian communities in Australia has increased steadily. Today around 12% of Australia's population have Asian heritage according to the 2016 census.

And while there have been some high-profile examples of Asian philanthropy in Australia such as Jack Ma's \$26 million gift to *The University of Newcastle* and Dr Chau Chak Wing's multi-million-dollar gifts to *UTS* and *The University of Sydney*, less is known about Asian philanthropy in Australia more broadly.

Wesa Chau, joint author of the 2018 report on Asian Australia Diaspora Philanthropy, will discuss the key findings of her research, including the how and why of Asian giving in Australia.

Learn how the Chinese concept of creating social harmony through giving is impacting here in Australia and learn too the subtle differences between giving among different Asian cultures. Wesa will be joined by a panel of Asian Australian donors to discuss their giving habits, motivations and interests.



WESA CHAU Director, *Cultural Intelligence*

Wesa Chau is an experienced manager, board director, speaker, trainer and specialist consultant on cultural diversity.

Wesa is the Director of *Cultural Intelligence*, a specialist consulting firm that helps organisations better understand cultural diversity and its impacts on design, decision making, customer service, messaging and policy setting. She has worked with clients ranging from government departments, educational institutions, corporations and nonprofit organisations.

Wesa's expertise has been recognized in a variety of ways and she has received numerous awards. In 2017 she was invited to participate on the Australia-China High Level Dialogue alongside Australian senior leaders and diplomats, and in 2016 she won the Australian International Education Award (Internationalisation).

A FAMILY AFFAIR - THE GIVING STORY OF JOHN B AND NICK FAIRFAX

Coming from one of Australia's most iconic and generous media families, John B Fairfax AO and son Nick Fairfax have been significant givers to a range of causes.

Through their giving vehicles the *Jibb Foundation* (started by John and his wife Libby in 2013) and the *John B Foundation*, the family supports projects which improve equality of opportunity around Australia, particularly in indigenous and rural communities.

Their longstanding involvement with journalism means that support for writers and journalists is high on their list of priorities, along with mental health and school education. In a rare interview, John and Nick

Fairfax will discuss the role that philanthropy plays in bringing together two generations of family and what they have learned about the practice of philanthropy. The Fairfaxes will be interviewed by Louise Walsh.



JOHN B FAIRFAX, AO

John B Fairfax is a director of *Marinya Capital*, his family office investment group. He began his career in 1961 as a

cadet journalist at the *John Fairfax Limited* newspaper *The Sydney Morning Herald* and worked in various management positions before joining the board in 1979.

He resigned as Deputy Chairman at the time of the *Tryart* takeover in 1987 and acquired an interest in *Rural Press Limited* where he was Chairman from 1990 until 2007, at which time it merged with *Fairfax Media*.

He then re-joined the *Fairfax* board until standing down in 2010. John has been a director of other public companies including *Westpac*, *GE Crane* and *Thomson Reuters Founders Share Company*.



NICK FAIRFAX

Nick Fairfax is the Managing Director of *Marinya Capital*, which runs the family office investments and affairs of

the *John B Fairfax* family. Prior to this he worked in accounting and the music industry. He has held numerous private and public company directorships including *Rural*

Press Limited and Fairfax Media Limited, and is currently a Director of the *Jibb Foundation* and Deputy Chairman of the *Sydney Film Festival*. Nick holds a Bachelor of Economics from *The University of Sydney* and is a Chartered Accountant.



Interviewer LOUISE WALSH
CEO, *Future Generation*

As CEO of the *Future Generation* companies

Louise also assists with the firm's philanthropic activities. She has been a senior executive in the nonprofit, government and private sectors and has spent much of her career working in the areas of sport, arts and philanthropy.

Louise was previously the CEO of *Philanthropy Australia*, and she is currently a board member of the *St Vincent's Curran Foundation*, the *City Recital Hall* in Sydney and the *Snow Foundation*.

RUNNING A CORPORATE FOUNDATION LIKE A TECH COMPANY - LESSONS FROM THE ATLASSIAN FOUNDATION

At *Atlassian* they have done things differently from the start. A love for innovation and risk has catapulted this Australian software start-up from humble beginnings in 2002 to a *Nasdaq* listed wunderkind of almost \$30 billion in 2018.

As a technology company, it's not a surprise that the organisation's approach to philanthropy and corporate social responsibility are also done differently. Led by Jonathan Srikanthan, the *Atlassian Foundation* takes a venture capital approach to grant making and builds philanthropic programs for scale.

Jonathan will discuss the foundation's strategy including how it fosters diversity of thought and openness to failure as being their best friend and teacher. He will also explain how measurement and data shape the foundation's work and shine a light on *Atlassian's* increasingly popular 1% pledge commitment.



Presenter JONATHAN SRIKANTHAN
Foundation
Director, *Global Engagement Programs, Atlassian*

Jonathan is passionate about the impact corporates can have on philanthropy. His experiences range from running corporate foundations, developing scalable philanthropic programs, creating shared value opportunities and coaching the next generation of social impact makers.

Prior to joining the *Atlassian Foundation*, Jonathan managed the *Qantas Foundation*.

Outside his professional career, Jonathan

is a passionate promoter of social enterprise. In 2015 he co-founded *Young Change Agents*, a social enterprise aimed at equipping young entrepreneurs with the skills to have positive social impact in their local communities.

NOTHING CAN STOP US - THE POWER OF PHILANTHROPY AND THE FSHD FOUNDATION STORY

Businessman turned philanthropist Bill Moss AO and his daughter Natalie Cooney, will discuss the family's philanthropic path, including how Bill's personal struggle with facioscapulohumeral muscular dystrophy (FSHD) motivated and inspired his family and a raft of fellow philanthropists.

In setting out to discover a cure to this muscle wasting disease, they created a thoroughly modern charity – *FSHD Global Research Foundation*,

which was named 'Charity of the Year' in 2017. Bill and Natalie will discuss their approach

to philanthropy, lessons learned, and their ideas on what a progressive

charity needs to be if it is to secure major philanthropic support. Bill and Natalie will be interviewed by *F&P* founder Jeremy Bradshaw.



BILL MOSS, AO

Bill Moss is a highly regarded businessman and philanthropist who suffers from facioscapulohumeral

muscular dystrophy. He spent 23 years as a senior executive and Executive Director with *Macquarie Group*, where he founded *Macquarie Real Estate Group*, ultimately managing global investments worth \$30 billion. He was the Group Head of *Macquarie's* banking and real estate group.

In 2007, Bill left *Macquarie Group* to pursue philanthropic initiatives which included launching the *FSHD Global Research Foundation*, Australia's first nonprofit organisation focused on finding a treatment or cure for facioscapulohumeral muscular dystrophy. Since 2007, the foundation has committed \$10 million to fund 42 ongoing medical research grants in 10 countries.



NATALIE COONEY Managing
Director, *FSHD Global Research Foundation*

Natalie Cooney has built a career in business, PR and

event management. From a young age she discovered a passion for the nonprofit sector and established *Champagne for Charity*, a nonprofit networking group aimed at creating social impact.

Driven to make a difference in the world, Natalie has been a board member of the award-winning *FSHD Global Research Foundation* and is currently its Managing Director. Inspired by her father's fight with *FSHD*, she has played an integral role in raising \$10 million to advance world's best medical research and education across 10 countries.

GROUNDBREAKING 'PIONEERS' INITIATIVE TO SHARE LEARNINGS

The brainchild of David Gonski AC, the *Pioneers in Philanthropy* initiative is a groundbreaking

collaboration between some of Australia's most highly-regarded business leaders and philanthropists to challenge the status quo in education funding.

The *Pioneers* are directing more than

\$5 million over five years to support schools in need. Major education philanthropist John Grill AO and his wife Rosie Williams will explain why the *Pioneers* model appealed to them and how they work collaboratively with other donors. They will also discuss what they have learned from the initiative, how it is evolving, and their hopes for its future.

Schools Plus is assisting with the project and CEO Rosemary Conn will facilitate the session, which will also include observations from *Smithfield Public School*, one of the schools participating in the project.



Panellists JOHN GRILL, AO & ROSIE WILLIAMS

The Chairman and former Chief Executive Officer of engineering company *Worley Parsons*, John Grill has over 40 years' experience in the resources and energy industry. In 2012 he donated \$20 million to *The University of Sydney* to establish the *John Grill Centre for Project Leadership*. He is Chairman of *Neuroscience Research Australia*. Rosie Williams trained as a nurse before embarking on a high-profile career in the fashion industry. Both are passionate philanthropists.

... the day was a terrific success filled with stimulating discussion.

KIRSTEN ROSS
Foundation Manager,
Wilson Foundation

It was such an enjoyable day. Plenty of insights & matters to reflect on shared through the sessions. Well done to the Generosity team!

JENNY WHEATLEY
Chief Executive Officer,
*Vincent Fairfax
Family Foundation*



Panellist JODI HARRIS
Smithfield Public School

Jodi is the Relieving Principal at *Smithfield Public School* in south-west Sydney, where she leads the 'Schools as Community Hubs' program, supported by the *Pioneers in Philanthropy* initiative.



Facilitator ROSEMARY CONN
CEO, Schools Plus

Rosemary is the inaugural CEO of *Schools Plus* and has had extensive experience in the business and nonprofit worlds. She has worked closely with schools, corporations and the community to bring about positive change in previous roles with the *Beacon Foundation*, *CAF Australia* and *Deloitte*.

EXCLUSIVE NEW RESEARCH - PUBLIC ANCILLARY FUNDS - ALL YOU NEED TO KNOW

New and unique research into Australia's Public Ancillary Funds (PuAFs) will be released for the first time at the *Generosity Forum 2019*.

Many are familiar with trusts, foundations, private ancillary funds and other giving vehicles which have been well-studied, but this is the first time that the covers have been pulled back to reveal new detail about PuAFs. How many are there? Who are the people that run them? Who is donating into them and how much? What causes are supported by PuAFs and how much do they give away? All this and much more will be shared.



Presenter DR DANIEL McDIARMID
Chairman, AskRIGHT

Dr Daniel McDiarmid has raised funds for education, research, and religious organisations for over 30 years across Australia and New Zealand. He has established fundraising and alumni offices at major universities, reviewed

fundraising programs of, and set strategy for, numerous organisations, led successful capital campaigns, and helped organisations build international fundraising capacity.

In 2004 he established *AskRIGHT*, a consultancy providing nonprofit organisations with research-based fundraising advice. Daniel has been an Adjunct Professor at the *Centre of Philanthropy and Nonprofit Studies (QUT)*. He is a director of the *Giving Institute*, an organisation for leading fundraising consultancies worldwide.

TRANSFORMING PHILANTHROPY THROUGH DATA

The data and predictive analytics revolution is beginning to impact the way social sector leaders make decisions and deliver services. Kristi Mansfield will explain how early adopting nonprofits and social purpose businesses are working with public data, donor behaviour data and client data to predict and improve client outcomes and make smarter fundraising decisions.

Philanthropist and impact investor, Deanne Weir, will explain why philanthropists should care about the data and predictive analytics revolution for social and community change. She will discuss how data, machine learning and predictive analytics can be a force for good offering enormous potential to arm communities with new, powerful tools to improve lives.

Community change agent, Anna Powell, will share her work using data to drive collaboration and shared decision making as part of the *Collective ed* project, an initiative in Tasmania designed to improve rates of year 12 completion and transition to meaningful pathways.



Panellist DEANNE WEIR
Director, WeirAnderson Foundation

A media entrepreneur, company director and philanthropist, Deanne Weir has more than 25 years' experience in media and communications. Deanne chairs the boards of two private companies in which her company, *WeirAnderson.com*, is a significant investor – *Hoodlum*, an *Emmy* and *BAFTA* award winning production company, and *Ai-Media*, a technology and social innovation company.

WeirAnderson is an investor in *Seer Data & Analytics* and Deanne is now also Chair of that company. She is a member of *Women Moving Millions* and was chair of the *Australian Women Donors Network*. In 2017 Deanne was appointed chair of the *Sydney Film Festival*.



Panellist KRISTI MANSFIELD
Co-founder & CEO, Seer Data & Analytics

Named one of Australia's 100 'Women of Influence' in 2015

by the *Australian Financial Review*,

Kristi Mansfield is a respected thought leader and commentator on the future of customer experience, big data and predictive analytics and social innovation. She has previously held executive roles in customer experience and transformation at *Oracle* and *Fifth Quadrant*.

Kristi has a long track record in the philanthropic sector as the former Executive Director of the *Sydney Community Foundation* and *Sydney Women's Fund* and founder of social and impact investment advisory firm, *Greenstone Group*.



Panellist ANNA POWELL
Collective ed

With over 15 years of experience in building networks and coalitions for

social change, Anna is currently the

Collective ed State Backbone Lead, working with a network of leaders and organisations across Tasmania to improve outcomes for young people.

With a grounding in systems change work through her early professional years in international development, Anna has held senior leadership roles across the community, international development, corporate and education sectors, including with *Oxfam* and the *Westpac Foundation*.

FOR BIG IMPACT GO LOCAL - SYDNEY COMMUNITY FOUNDATION INNOVATES WITH PLACE-BASED PHILANTHROPY FOR HIGH LOCAL IMPACT

One of the many positives of community foundations is their ability to bring together like-minded donors to fund specific local projects. *The Sydney Community Foundation*, with its *Sydney Women's Fund* – a collection of donors interested in supporting causes for women and families, embarked on an innovative 'place-based' philanthropy program in 2013.

This multi-year initiative tackles entrenched disadvantage in areas of Western Sydney with a focus on giving opportunity for learning to women. The *WeirAnderson Foundation* committed a gift of \$100,000 a year for five years to support various *Sydney Women's Fund* projects.

Deanne Weir will discuss what she has learned about how philanthropy can have a big impact in a small local setting. Jane Jose, from the *Sydney Community Foundation*

and Pat Hall, from *Liverpool Neighbourhood Connections (LNC)*, the local charity delivering the programs, will share their perspective on how philanthropy can target small local issues to great effect.



Panellist JANE JOSE
CEO, *Sydney Community Foundation*

Jane has written, shaped and informed place-making policy for two decades in cities

across Australia. She now brings that experience in working with communities, the design professions, government leaders and corporate Australia to her philanthropy work, transforming communities through grassroots programs.

Panellist DEANNE WEIR
Director, *WeirAnderson Foundation*

See bio earlier in program.



Panellist PATRICIA HALL
CEO, *Liverpool Neighbourhood Connections*

Pat oversees the extensive operations of *Liverpool Neighbourhood Connections (LNC)*

providing more than 68 programs and services per week with approximately 22,000 clients accessing services annually.

Over the past five years, Pat has worked in partnership with the *Sydney Community Foundation* and the philanthropy community to successfully expand a single social enterprise cafe into five distinct profit for-purpose businesses.

THE ATLANTIC PHILANTHROPIES - A REVOLUTION IN AUSTRALIAN GIVING

Between 1998 and 2016, entrepreneur Chuck Feeney and his foundation, *The Atlantic Philanthropies (AP)*, gave AUD\$549 million in grants to grow Australia's biomedical research, higher education, social equity and leadership capabilities. This level of giving was unprecedented at the time and changed the giving landscape in Australia.

Dr Dave Kennedy, the former Executive Director of *AP*, was responsible for the foundation's grantmaking and related fundraising during the period 2012-2017. Dave will reveal the five-step approach utilised by *AP* in its grant-making and discuss Feeney's 'giving while living' philosophy that influenced some of our leading donors, including Andrew and Nicola Forrest, Graeme Wood, and Len Ainsworth. He will also discuss some of the learnings and lessons that emerged for Australian philanthropy.

Dave will describe how grantees, governments, and Australian philanthropists were advised and supported during this period, and how the foundation's grants leveraged a further \$1.5 billion in giving.



Presenter DR DAVE KENNEDY
Managing Director,
drdavekennedy.com Pty Ltd & Founder, igiveonepercent.org

Dr Dave Kennedy is one of

Australia's most experienced fundraising and grantmaking executives, having worked on total capital campaigns valued in excess of AUD\$1 billion. *drdavekennedy.com Pty Ltd* is an advisory firm that provides grant making advice to high-net-worth families and foundations, and fundraising assistance to nonprofit organisations. Dave launched *igiveonepercent.org* as an initiative to promote a new norm for annual giving. He received his PhD from *Cornell University* in 1999 and has lectured at universities in Australia, Asia and the USA.

FAITH-BASED GIVING IN 21ST CENTURY AUSTRALIA

How does a person's religious affiliation affect their giving? Christian and secular Australians often understand other faiths through a surface view of 'food and festivals', but other faiths have deep traditions of philanthropy which increasingly demand to be understood.

This panel will explore what models of giving might influence all Australians in the future as the mix of our cultural and faith backgrounds evolve and how religious beliefs and values affect giving. Key attributes of giving amongst the Buddhist, Jewish and Islamic faiths will be discussed.



Panellist PETER PHILLIPPSOHN OAM

Peter has been involved in a leadership role in Sydney's Jewish community for almost 40 years. After being the founding

president of *Mount Sinai College* in Maroubra, Peter was approached to join *JCA (Jewish Communal Appeal)* which is the centralised planning and fundraising organisation for Sydney's Jewish community. In his time at *JCA*, Peter chaired its fundraising activities and he has also held directorships on various endowment funds.



ABDULLA RAHHAL Acting Director of Fundraising & Community Relations, Islamic Relief Australia

Abdulla was appointed to

his current role in 2018, having worked for the previous four years in communications, marketing and legal roles also at *Islamic Relief Australia*.

Prior to this, he worked as an Associate Solicitor at *Mitry Lawyers* and as the Legal Advisor for the Grand Mufti of Australia, Dr Ibrahim Abu Mohamed. He was admitted as a Lawyer of the *Supreme Court of NSW* in February 2013 and became the Principal Solicitor of *Headstart Legal* in November 2017.

Panellist VENERABLE JUE FANG International Relations Director, Nan Tien Institute



Facilitator ROEWEN WISHART
CFRE, FFIA, Director,
Xponential Strategy

Roewen has worked in fundraising roles for 25 years

and specialised in major gifts and capital campaigns. Much of his experience was built during 11 years at *Bush Heritage Australia* where he led a very successful major gifts program that raised \$22 million.

He was also the Foundation Director at *Neuroscience Research Australia (NeuRA)* before taking up his current role, where he advises charity and nonprofit organisations on fundraising strategy and major gift campaigns.

ARTS GIVING - THE WHYS AND WHEREFORES

Hear from committed donors to whom the arts are a crucial part of life. Learn from them what makes arts philanthropy different, and why they do it when there are other causes which could seem more urgent.

Peter McMullin is a major donor to the *Australian Chamber Orchestra (ACO)* but he is also a keen supporter of refugee rights. Learn what he loves about giving to the orchestra, and how these two sides of his philanthropy dovetail.

Peter will be joined by Julian Knights, former Chair and a major donor to the *Sydney Dance Company (SDC)*. Anne Dunn, Executive Director of *SDC*, will reveal how *SDC* transformed its philanthropy program with support from the board. Richard Evans, Managing Director of the *ACO*, will discuss the unique opportunities philanthropy provides for his organisation.



Panellist PETER MCMULLIN
Chairman & Director,
McMullin Group

As well as his role at the privately-owned diversified investment company *McMullin*

Group, Peter is Special Counsel for *Cornwall Stodart Lawyers*. Peter believes the private

sector has an important role to play in the resolution of many of our pressing social issues and recently made one of the most significant gifts in the history of *The University of Melbourne Law School* to establish the *Peter McMullin Centre on Statelessness*.

Peter has served in a range of roles, including Deputy Lord Mayor of Melbourne, Mayor of Geelong, President of the *Victorian Chamber of Commerce and Industry*, and Deputy President of the *Museums Board of Victoria*.



Panellist JULIAN KNIGHTS, AO

Julian has more than 35 years experience in the financial services industry and is a founding partner of leading Australian private equity firm

Ironbridge Capital.

Julian served on the board of the *Sydney Dance Company* for seven years and was Chairman from 2007 to 2013. He was the organisation's major donor over this period and instituted a successful culture of board engagement, which helped to grow donations significantly and secure the organisation's financial and artistic health.

In June 2016, Julian was made an Officer in the Order of Australia for services to the performing and visual arts and to the financial services industry.



Panellist ANNE DUNN

**Executive Director,
*Sydney Dance Company***

Anne has 18 years' experience in the performing arts and has delivered successful programs,

festivals and events around Australia. She has held her current position since 2010. Anne was previously the *Darwin Festival* General Manager (2006-09), *Perth International Arts Festival* Program Manager and Artistic Administrator (2003-06), *Sydney Opera House Assistant Producer* and *Sydney Olympic Coordination Authority Live Sites Event Coordinator* (2000). Anne is a Trustee of the *Sydney Opera House Trust*.



Panellist RICHARD EVANS
Managing Director, *Australian Chamber Orchestra (ACO)*

As well as his role with the ACO, Richard is Principal of

REA Consulting. Throughout his career he has held a range of senior roles including Executive Director of the *Bell Shakespeare Company*, Managing Director of Sydney's *BridgeClimb*, Executive Director of *The Australian Ballet*, and CEO of the *Sydney Opera House*.

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1 Online at fpmagazine.com.au/genforum2019

2 Complete this form and return to:

Address Suite 1/12 Alma Rd, New Lambton NSW 2305

Email akaruso@bomborapublishing.com.au

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68 Market Street, Sydney NSW 2000

Date

Friday 3 May 2019

Accommodation

It is the responsibility of delegates to arrange their own accommodation if required. *Swissôtel Sydney* extends a 10% discount off the best available rate at time of booking, to conference delegates. This rate is non-commissionable. If you wish to secure this rate, call reservations directly on +61 2 9238 8888 or email ssy.reservations@swissotel.com and mention the booking code ID: **BOMB03519**. Rates are based on availability. For more information visit swissotel.com/sydney.

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The background is a vibrant, abstract marbled pattern in shades of teal, turquoise, and light blue, with scattered golden-yellow speckles and swirls. The pattern has a fluid, organic quality, resembling marbled paper or a microscopic view of a mineral.

F&P

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