

Generosity Forum

2020



PHILANTHROPY INSPIRATION • BEST PRACTICE • CHANGEMAKERS

Tuesday 5 May • Pullman Melbourne on the Park

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Welcome

INSPIRATION, INSIGHT, BEST PRACTICE & 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 2020 *Generosity Forum*. Keep an eye on the forum website fpmagazine.com.au/genforum2020 for the updated full program.

CATALYTIC PHILANTHROPY – MENZIES FOUNDATION ADOPTS NEW APPROACH TO GIVING

Established in 1979 in memory of Sir Robert Menzies, the *Menzies Foundation* had a very traditional approach to giving for its first 40 years – awarding scholarships and supporting medical research. However, in 2018 the foundation established a bold new vision, and with it, a mission to transform itself.

Come and learn about the foundation's new ambition to create a strategic platform to catalyse leadership challenges, both in Australia and overseas. It's already building multi-sector incubators to impact school leadership and science entrepreneurship.

Liz Gillies and Peter Jopling AM, will also discuss the internal challenges and key factors in successfully transforming the foundation.

LIZ GILLIES, CEO, *Menzies Foundation*



Appointed in 2018, Liz brings over 20 years' experience in social impact, philanthropy and leadership development to the role of the CEO at

the *Menzies Foundation*. She has worked across the nonprofit, university, government and private sectors. Liz was instrumental in establishing the *Centre for Ethical Leadership* and the *Asia Pacific Centre for Social Impact* during her six years with the *Melbourne Business School* at *The University of Melbourne*. During this time, Liz was awarded a research

fellowship to investigate best practice in philanthropy, culminating in the national launch of the *Best Practice in Philanthropy Report* in 2018.

PETER J JOPLING AM, QC



Peter Jopling is one of Australia's leading Queen's Counsels, specialising in commercial law. A life Governor of *The Florey*

Neuroscience Institutes, he is also Chair of the *Ian Potter Museum of Art*, the *Menzies Foundation* and the *Peter O'Callaghan QC Gallery*. Previous posts include Deputy Chair of the *Australian Centre for Contemporary Art*, Director of the *McClelland Sculpture Park and Gallery* and Director of the *National Gallery of Australia Foundation*. In 2014 Peter was awarded an AM for significant service to the law in Victoria and to the community.

THE PHILANTHROPIC IMPERATIVE TO ADDRESS CLIMATE ISSUES

In this era of climate crisis, do other crises matter? If they do – think housing, think health, think violence against women – should we view them through a 'climate lens'?

Greenpeace's David Ritter and Hayley Morris (*Morris Family Foundation*), will discuss the vital importance of increasing the philanthropic contribution to tackling global warming and prioritising root causes of the climate emergency through advocacy.

Hayley will reveal how and why her family foundation has made climate a priority for funding, and David will discuss case studies and opportunities for collaboration in Australia and abroad.

DAVID RITTER, CEO, *Greenpeace Australia Pacific*



Prior to joining *Greenpeace*, David worked for ten years as a lawyer and academic. His most recent book is *The Coal Truth: The Fight to Stop*

Adani, Defeat the Big Polluters and Reclaim Our Democracy. In addition to his work at *Greenpeace*, David holds honorary appointments at *The University of Sydney* and *The University of Western Australia*.

HAYLEY MORRIS, Executive Director, *Morris Family Foundation & Morris Group Holdings*



Hayley plays a leading role in the family businesses and investments spanning hospitality, tourism, aviation, technology and agriculture. She also leads

her family's philanthropic arm, the *Morris Family Foundation*, supporting projects in the areas of environment, food systems, international development, health and social welfare. Hayley co-founded environmental nonprofit *Sustainable Table* and a software and consultancy business, *Impact Sustainability*. She was previously a board member of the *Australian Environmental Grantmakers' Network*.

UNITED WE GIVE

Collective giving – be it local, state or nationally focused – is seeing strong growth around the country, with organisations like *Impact100*, *The Channel*, *Melbourne Women's Fund* and *10x10* showing the way.

James Boyd, National Convenor of *Collective Giving Australia*, will discuss the most recent global research on the growth and impact of community-level collective giving. James will also outline how to set up a collective giving group and the key ingredients to make it successful for the long-term. Paula Thomson of the Melbourne-based *Mangkaja Circle of Friends*, will share a real-life example of how one collective giving group is growing generosity from the bottom up.

JAMES BOYD, State Manager WA & SA, Creative Partnerships Australia



A pioneer in collective giving, James brought *Impact100* to Australia in 2012 and co-authored the report *Collective Giving and its Role in Australian*

Philanthropy. At *Creative Partnerships Australia*, he coaches and mentors arts managers and artists on strategic, cross-sector partnerships, philanthropy and business modelling and has worked with over 250 arts companies on strategic sustainability. In a previous role, James raised over \$15 million for the *West Australian Symphony Orchestra*, including securing the funds to send the orchestra on its first international tour.

PAULA THOMSON, Convenor, Mangkaja Circle of Friends



Paula has a background in nonprofit fundraising, communications and philanthropy across environment, health and cultural organisations.

Paula cites career highlights as the protection of *Ned's Corner Station* whilst working with *Trust for Nature* and drawing connections between private philanthropy and emerging nonprofits. Paula is a passionate advocate for community and generosity in all its forms. She currently runs a private family foundation in Melbourne.

ON YOUR MARKS, GET SET, GIVE! HOW TO GIVE AWAY \$10,000 A WEEK

After experiencing great success with his business, *Advantage Salary Packaging*, Anton Gaudry decided to turn his hand to

philanthropy. Anton and his wife Jenny, set up the *Gaudry Foundation* in 2018 and wondered, with so many great causes, who to give to? Everyone was the answer. The Gaudrys set themselves the ambitious goal of giving away \$10,000 to a different charity each week for a whole year.

Hear about the highs, lows and learnings of this unique philanthropic initiative as Anton and Jenny share the story of their mission to give away \$520,000 over a year of weeks. The Gaudrys will also explain their plans to get more Australians giving.

ANTON + JENNY GAUDRY, Founders, Give52



With backgrounds in business and community work, Anton and Jenny Gaudry are no strangers to the world of philanthropy, having been

generous contributors to a number of health, education and children's charities over the past decade. Since 2018, their mission to build the culture of giving among Australians has, after their family, become their chief interest.

GUIDE DOGS VICTORIA – THE POWER OF PHILANTHROPY TO LEVERAGE GOVERNMENT SUPPORT

When *Guide Dogs Victoria (GDV)* set out to raise over \$23 million for an innovative new sensory campus, it knew it would need to secure significant philanthropic and government support.

The 'world-first' sensory campus, which includes new social enterprises to provide ongoing revenue, attracted the likes of *Gandel Philanthropy*, the *Ian Potter Foundation* and *Wheelton Philanthropy*.

Hear how the pro-active, strategic involvement of major philanthropy, working in close partnership with *GDV*, helped leverage time-critical government support to the tune of \$5 million. This is an excellent case study with learnings on philanthropic collaboration, how to approach government and the power of a big idea.

PAUL WHEELTON AM KSJ, Wheelton Philanthropy



Paul's success in the car rental industry over 40 years, enabled him to develop major philanthropic interests. Chair of *GDV's* capital

campaign, Paul is also a board member of *Life Education Australia Foundation* and *Blue Ribbon Day*. He is a founding Chairman of the *Bali Children Foundation*, providing educational

pathways for thousands of disadvantaged children. In 2018, *Wheelton Philanthropy* was awarded the inaugural *International Philanthropy Award* by the *Department of Foreign Affairs and Trade*. Paul was awarded an AM in 2017.

KAREN HAYES AM DSJ, Chief Executive Officer, Guide Dogs Victoria



Karen's career has spanned both the corporate and community sector and she is a past finalist of the *Telstra Business Woman of the*

Year awards. Karen joined *GDV* as CEO in late 2011 and is a board member of *Multiple Sclerosis Ltd* and the *International Melbourne Comedy Festival*. She was also a founder and board member of *Breast Cancer Network Australia*. In January 2019, Karen was awarded an AM for her contributions to Women in Sport, Gender Equality and Community.

VEDRAN DRAKULIC OAM, CEO Gandel Philanthropy



Vedran has had a long involvement within the for-purpose and philanthropic sectors, including more than 10 years with the *Red Cross*

in senior communications and fundraising roles. He was also General Manager of Public Affairs with *RACV*, a Director of *AMES Australia* and a Trustee of the *Betty Amsden Foundation*. Vedran was awarded an OAM in 2017.

ALBERTO FURLAN, Senior Program Manager, The Ian Potter Foundation



Alberto moved to Australia in 2001 to undertake doctoral studies in Anthropology at *The University of Sydney* and then worked for five

years on the management and protection of sacred sites for the *Central Land Council* in Tennant Creek. At *The Ian Potter Foundation* since 2009, he administers the community wellbeing, medical research and health and disability areas of funding and provides strategic advice to the board around impactful partnerships with the nonprofit sector.

NEW RESEARCH TO REVEAL THE STATE OF CORPORATE PHILANTHROPY

Interested in which Australian companies give the most to the community? Want to know how much our largest corporations contribute

in dollar value or percentage of profit? Jarrod Miles will reveal the latest results of the ongoing *GivingLarge* research and provide useful insights into the state of corporate philanthropy in Australia. He and Patrick Castauro will share their experiences managing their companies' community investments, with best practice examples and insights into how to engage corporations in 2020.

The 10 companies, which combine to give almost 80% of the *GivingLarge* total, will also be revealed and Jarrod will share his perspective on working together to increase corporate giving in Australia.

JARROD MILES, Co-founder and Director, Strive Philanthropy



With a career spanning the corporate and nonprofit sectors, Jarrod has seen first-hand the meaningful impact that effective corporate giving can have across our community. In 2017 he co-founded *Strive Philanthropy*, a research organisation dedicated to highlighting the notable philanthropic efforts of corporate Australia. *Strive* releases the annual *GivingLarge* report, which compiles the community investment statistics of Australia's top companies. *GivingLarge* is supported by *Philanthropy Australia* and its findings are empowering Australian businesses to increase their community contributions, and ultimately drive social change.

PATRICK CASTAURO, Director, Sustainability and Ethics, CSL Limited



Patrick commenced with CSL in 2009 and has served various roles in the sustainability/corporate responsibility function over this time. In his current role Patrick leads CSL's global sustainability efforts and supports other aspects related to corporate governance. Prior to CSL, Patrick was delivering complex change and capital programs to customer facing functions at *Optus*. Patrick has a Bachelor of Science from *The University of Melbourne*, and a Graduate Certificate in Change Management from the *University of NSW*.

WHY GIVE OVERSEAS?

At a time when issues at home seem so pressing, what makes some donors choose to send their philanthropy overseas?

Hear the answer from major donors and leaders of two charities – NZ-based *So They Can*

Can (which improves education opportunities for children in Africa) and Melbourne-based *International Women's Development Agency* (which advances and protects the rights of women and girls across the globe).

Learn why these causes speak to major donors in a way nothing else can, and what these donors get in return for their significant investments.

CASSANDRA TREADWELL, CEO and Co-Founder, So They Can



Cass founded *So They Can* in 2009 to work with local communities and governments in Africa, to provide quality education to children living in poverty. Prior to *So They Can*, Cass worked as a lawyer in hospitals and health boards in Australia and New Zealand. For her work in international development, Cass was nominated in 2015 for New Zealander of the year and in 2018 was a finalist in the *New Zealand Women of Influence Awards*.

PETER HUNT, AM Chair, So They Can



Peter co-founded banking advisory firm, *Caliburn Partnership*, in 1999 and was Executive Chairman of the firm until its sale in 2009. He continued as Chairman until 2018 when he left to concentrate on philanthropy. As an investment banker, Peter advised corporates and governments in Australia for nearly 35 years. Major assignments included the *Westpac* takeover of *St George Bank*, the *AMP* demerger and recapitalisation, the privatisation of *Telstra* and *James Hardie's* arrangement for long-term funding for people with asbestos-related diseases.

BETTINA BALDESCHI, CEO, International Womens' Development Agency



Bettina joined *IWDA* in 2012 as Director of Communications and Fundraising, leading the transformation of its brand identity, media profile and communications strategy. Fundraising saw unprecedented growth during this time, with over 28,000 new supporters joining *IWDA*. Bettina later served as the Director of *IWDA's* Individual Deprivation Measure program and was appointed CEO in December 2017. Before joining *IWDA*, Bettina held executive roles with *Oxfam Great Britain* and worked with *UNHCR* in Canberra.

DALE HESS, Trustee, Arnold Foundation



Dale is a retired atmospheric scientist, based in Melbourne. He was a founding board member of the *Herb Feith Foundation* (now the *Monash Herb Feith Indonesian Engagement Centre*) and is secretary of the *Pacific Fellowship*. His interests include peace education and international development, with a particular interest in promoting greater freedom and justice for the people of West Papua through nonviolent action.

SHINING A LIGHT ON THE DONOR-BENEFICIARY POWER IMBALANCE

What if we changed the power dynamics between funders and grantees? Could we have more impact? What if, instead of nonprofits asking 'what do you want to fund?', funders asked (and supported) 'what's needed?'

This panel will explore the dynamics between philanthropy, power and impact. It will unpack provocative ideas around what is funded, the outcomes achieved, the roles and responsibilities of nonprofit leaders and funders, and the different types of power dynamics that sit beneath these issues.

SHAMAL DASS, Head of Philanthropic Services, JBWere



Shamal joined *JBWere* in 2012 and has led the team since November 2014. He provides specialist strategic advice to both for-purpose organisations and private clients in areas such as governance, capacity building and sustainability. Before *JBWere*, Shamal worked in the financial services industry, advising high net worth individuals on their philanthropic structures, managing trusts and foundations and constructing charitable foundation investment portfolios. Shamal is a Non-Executive Director of *Earthwatch Australia* and *Two Good Foundation* and Chair of the *Governance Group of The Constellation Project*.

PROFESSOR KRISTY MUIR, CEO, Centre for Social Impact; Professor, UNSW Business School



Kristy has worked for almost three decades with for-purpose organisations and partnered with dozens of nonprofit, government, corporate and philanthropic organisations on

projects to increase social impact. Kristy was formerly CSI's Research Director, Associate Dean (Research) for the *Faculty of Arts and Social Sciences* and the Director of the *Disability Studies and Research Centre at UNSW*. Kristy is a member of *UNSW Sydney's Council* and the *NSW Premier's Council on Homelessness*, as well as Chair of *Allan & Gill Gray Philanthropy Australasia*.

MICHAEL PERUSCO, CEO, Berry Street



Appointed CEO of *Berry Street* in February 2018, Michael has extensive experience in senior leadership roles, including CEO of the *St Vincent de Paul Society NSW* and *Sacred Heart Mission* in Victoria. He worked at the *Department of Prime Minister and Cabinet* leading the social inclusion agenda and nonprofit reform agenda. Amongst other things, Michael is a member of the *Victorian Government's Roadmap for Reform Ministerial Advisory Group* and the *Aboriginal Children's Forum*, is on the boards of the *Australian Institute of Health and Welfare* and the *Centre for Excellence in Child and Family Welfare*.

RACHEL ENGLISH, Trustee, English Family Foundation; Philanthropy Consultant, Mutual Trust



Rachel has worked in fundraising, service delivery and grant making. She currently works at *Mutual Trust*, assisting families with their giving strategies. She is also a Trustee of the *English Family Foundation*, focused on driving transformational change through partnerships, with early stage social enterprises in Australia and South East Asia. Rachel encourages and mentors the next generation of philanthropists and to this end, co-chairs *NEXUS Australia*, a global network uniting young investors, social entrepreneurs, philanthropists and allies to promote new leadership and accelerate needed change.

PHILANTHROPY AS RISK CAPITAL

Much of the work that *Mission Australia* has carried out over 160 years with disadvantaged people, has been funded by philanthropists like those who founded the organisation.

However, James Toomey has begun to wonder if the very philanthropy his organisation relies on, actually locks disadvantaged communities in dependency at the expense of social change.

Come and hear James engage *Mission Australia's* major supporter, the *Sir David Martin Foundation*, in a 'no-holds-barred' conversation about the need for a new model of philanthropy, more akin to risk capital, focused on outcomes, not just inputs and outputs. Where should philanthropy sit in rewarding risk and performance to grow efficiency?

JAMES TOOMEY, CEO, Mission Australia



A qualified social worker, James joined *Mission Australia* in 2010 as National Manager Community Services Operations Support and

was appointed to his current role in November 2017. Previously, James was the Operations Director for *SkillForce*. He was also Assistant Director of *Foster Care Associates* in the UK. James is a Director of *Mission Australia Housing (Victoria)* and the *End Street Sleeping Collaboration*. He holds an MBA and is a graduate of the *Australian Institute of Company Directors*.

HELEN CONNEALY, General Manager, Sir David Martin Foundation



Helen has over 25 years' experience in strategy development, stakeholder engagement, income generation and marketing across health, education,

community services and international development. She has led several nonprofits through periods of transition and transformation and is a graduate of the *Australian Institute of Company Directors*. Helen is an advocate for young people and a Leadership Hub Chair for the *NonProfit Alliance* and strives to foster leadership and inclusion to build a better society

'NOT IF, WHEN' – HOW UQ ATTRACTED NEW SUPPORTERS FOR ITS \$500 MILLION CAMPAIGN

When *The University of Queensland (UQ)* launched its 'Not if, when' campaign in 2017 to raise \$500 million by 2020, the institution knew it would need to find new major donors.

Jennifer Karlson will outline some of the key ways the university was able to attract new supporters from outside the usual alumni pool. Generous supporter, Bill Bowness, will explain why his family are such passionate supporters of *UQ*, despite living and growing a business in Victoria.

You will also learn how tactics such as a giving day, a founders' pledge and matched

giving, enticed significant local, interstate and international donors to answer the *UQ* call.

JENNIFER KARLSON, Pro-Vice-Chancellor (Advancement), UQ



Jennifer joined *UQ* in 2017 to lead the University's first comprehensive philanthropic campaign and advise the Vice-Chancellor on strategy,

external engagement and institutional advancement. Jen's career spans the US, West Africa and Asia Pacific, including roles at American *Red Cross* and the *YMCA*. Previously, she was Assistant Dean, Advancement, at the *College of Letters and Science* and Senior Director of *Development and Strategy Manager* at the University of Wisconsin-Madison. In April 2019, Jen was responsible for bringing *CASE Asia Pacific* to Australia.

WILLIAM (BILL) BOWNESS, AO Bowness Family Foundation; Chair, Wilbow Group



Bill built a property development empire that has enabled him to become a significant donor through his *Bowness Family*

Foundation which supports the arts, disability and communication and education.

He is a former Chair of the *Monash Gallery of Art Committee of Management* and a Trustee of the *Monash Gallery of Art Foundation*. Bill was appointed a Member of the *National Gallery of Victoria Foundation* and *The Australian Ballet Foundation* in 2010. In 2018 he was invited to join the *Tate International Council* in recognition of his support of art in Australia and internationally.

WELLBEING: A NEW WAY TO MEASURE SOCIAL IMPACT

Since 2009, *OECD* countries have been spending historical highs of 21.1% of GDP on social issues. Yet, by most accounts, things are getting worse.

To break this impasse, *Trust Waikato (NZ)* has trialled a different approach to measuring social impact. It now measures the 'wellbeing' of its community across its grant and impact investing initiatives.

In this session, you will learn why measuring wellbeing holds the key to directing resources that actually solve complex social issues. Case studies where wellbeing is being tracked will be outlined and you will learn how to build a social impact model relevant to your strategic goals.

REGISTRATION INFORMATION

GEORGINA CAMP, CEO & Founder, *Huber Social*



Georgina Camp's team is committed to creating a global society where wellbeing thrives. Following a 10-year career across global law firms, management consulting and defence, Georgina transitioned to the social sector to address social issues at their root cause. She holds a Master of Development, Bachelor of Law and Bachelor of Arts (Politics and International Relations). Georgina was recently recognised in the 2019 *Australian Financial Review's* top 100 Women of Influence.

DENNIS TURTON, Chief Executive, *Trust Waikato*



Dennis has worked with *Trust Waikato* for six years, four of them as Chief Executive. *Trust Waikato* is a regional community trust established by government statute in 1988, to hold and manage the shares of *Trust Bank Waikato* and to help create vibrant and resilient Waikato communities. His previous experience includes leading small to medium enterprises. Dennis is on the boards of *Child Cancer Foundation* and *New Zealand Waterpolo*.

SHOULD PHILANTHROPY BE DOING MORE FOR MENTAL HEALTH?

A recent report, *Australia's mental health crisis: why private funders are not answering the call*, found that while 85% of private funders believe Australia is facing a mental health crisis, only 28% directly and consistently invest in mental health causes.

Join John Grant AM (*Grant Family Charitable Trust*) and Jennifer Dawson (*BHP Foundation*) as they discuss why they are bucking the trend and making a priority of funding mental health programs. Hear them discuss techniques for changing the philanthropic mindset, and how they have learned to work within this diverse and challenging sector. This session will be moderated by Louise Walsh.

JENNIFER DAWSON, Australian Program Director, *BHP Foundation*



Jennifer Dawson leads the *BHP Foundation's* Australian Country Program that has a focus on indigenous governance and harnessing the potential of young people. With nearly 20 years' experience in community development, Jen has worked in a range of organisations with local to global footprints, all centred on community empowerment,

human rights and being effective partners with indigenous peoples.

JOHN GRANT, AM Chairman, *Grant Family Charitable Trust*



After a 40 year career in venture capital and on corporate boards, John has embraced philanthropy as Chairman of the *Grant Family Charitable Trust*, which he established in 2009. The Trust aims to create better outcomes for vulnerable, young people suffering from mental illness, social deprivation and homelessness. The Trust seeks to

collaborate with other organisations and people wanting to make a difference. So many young people are struggling; working together, more can be done to help them.

Moderator 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 is currently a board member of the *St Vincent's Curran Foundation*, the *City Recital Hall* in Sydney and the *Snow Foundation*.

HOW TO REGISTER

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1 Online at fpmagazine.com.au/genforum2020

2 Complete this form and return to:

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ESSENTIAL INFORMATION

Venue

Pullman Melbourne on the Park
192 Wellington Parade, Melbourne

Date

Tuesday 5 May 2020

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It is the responsibility of delegates to arrange their own accommodation if required. *Pullman Melbourne on the Park* is delighted to offer a discount of 10% off the best available rate at the time of booking. Bookings are subject to availability. This rate carries a 24-hour cancellation policy, and a credit card will be required at the time of booking to secure the reservation. To access this rate, contact hotel reservations directly on +61 (3) 9412 3154 or email H9875@accor.com and quote Block ID Number: 145760. For more information, visit pullmanonthepark.com.au.

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Cancellations must be advised in writing to akaruso@bomborapublishing.com.au by Friday 3 April 2020. A 50% cancellation fee applies. Cancellations received after this date will not be eligible for a refund, however registrations may be transferred.

NETWORKING DRINKS

For the first time at *Generosity Forum*, networking drinks will be held after the last session from 5pm – 6pm. If you would like to attend, please indicate on the registration form. Tickets include drinks and finger food and must be purchased in advance. Only delegates who have purchased a ticket will be admitted.

ENQUIRIES

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Generosity Forum 2020

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