



9 June 2015

MEDIA RELEASE

**Grant Samuel Funds Management invests in institutional business
with senior appointment**

Grant Samuel Funds Management (GSFM) has appointed Ms Vivienne Lee to the newly created role of senior manager – institutional business. Ms Lee will be based in Sydney and will have a national focus.

Reporting to Mr Andrew McKinnon, chief executive officer, and Mr Damien McIntyre, head of distribution, Ms Lee's appointment reflects GSFM's intention to further invest in its institutional business, reflecting its commitment to its fund manager partners.

Ms Lee will focus on marketing the investment strategies of GSFM's four local and international fund manager partners - Epoch Investment Partners (global equities), Payden & Rygel Investment Management (global fixed income), Tribeca Investment Partners (Australian equities) and Triple 3 Partners (managed volatility), to institutional investors.

"Among our four partners, we have funds under management of \$5.7 billion, made up of \$3.85 billion from institutional clients and \$1.85 billion from retail clients," Mr McKinnon says.

"With two thirds of our funds under management coming from institutional clients, it is imperative that the level of commitment given to our partners continues to be consistent with our business development goals.

"Vivienne's appointment will help ensure we are constantly in front of, and servicing, clients and prospects at the institutional level, be it with industry superannuation funds, government institutions or corporate superannuation funds, as well as the asset consultants who advise them," Mr McKinnon says.

Ms Lee has over 20 years' experience in the financial services industry, and has held senior positions for Perennial Investment Partners and has also worked for BT Funds Management, State Street Australia and Westpac Financial Services.

Mr McIntyre says Ms Lee's skillset aligns with GSFM, and her established relationships with industry leaders across Australia are a testament to her prior success in the industry.

"Vivienne is a very experienced business development manager with established relationships across the spectrum, having achieved a solid grounding in custody and institutional funds management over the past two decades," Mr McIntyre says.

“Vivienne has experience in working across a number of different asset classes for some of Australia’s top fund managers,” Mr McIntyre says.

Ms Lee holds a MBA and a Management Development Certificate from the Mt Eliza Business School – University of Melbourne and is PS146 qualified.

She is also a board member for the investment committee of the Uniting Church in Australia.

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Grant Samuel Funds Management (GSFM) was established in July 2007 and is a subsidiary of the Grant Samuel Group, and co-owned by the executives of GSFM. Grant Samuel Group is an independent investment advisory house founded in 1988 and owned by its executives. GSFM specializes in marketing funds managed by high calibre local and international managers to Australian and New Zealand institutional and Australian retail investors.

GSFM formed an alliance in October 2007 with New York based Epoch Investment Partners, Inc. to distribute Epoch’s investment products to Australian and New Zealand clients.

In May 2008, GSFM acquired an equity stake in Tribeca Investment Partners, a successful Australian boutique manager which has been investing clients’ funds since 1999.

In May 2011, GSFM formed a relationship with Payden & Rygel, a Los Angeles based independent investment management firm established in 1983, to distribute its global fixed income and absolute return strategies in the Australian and New Zealand market.

In early 2014, GSFM established a relationship with Triple Three Partners Pty Ltd (Triple3) a boutique research and investment management firm based in Sydney. Triple3 specialises in volatility as an asset class.

GSFM currently represents \$5.7 billion funds under management (as at 30 April 2015). For more information about GSFM please visit the website: www.gsfm.com.au.