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MEDIA RELEASE

Grant Samuel Funds Management appoints head of institutional business

Grant Samuel Funds Management (GSFM) has appointed Mr Charles Levinge to the newly created role of head of institutional business. Mr Levinge will be based in Melbourne and report to director and head of distribution Mr Damien McIntyre.

Mr Levinge joins GSFM from Franklin Templeton Investments, where he has held the position of senior manager, institutional sales for the past nine years. At Franklin Templeton he was responsible for raising institutional assets across Southern Australia.

Prior to this he was head of business development for MMC Asset Management. Before moving into business development, Mr Levinge spent over 10 years in human resources management and consulting for a range of organisations including PricewaterhouseCoopers, Westpac, AMP and Clayton Utz.

GSFM has also promoted Mr Stephen Fletcher to head of retail distribution. Mr Fletcher has been with GSFM since 2008, most recently as state manager for Victoria and Tasmania. He will also report to Mr McIntyre.

Mr Fletcher has over 24 years' experience in the financial services industry, spanning funds management and financial planning. He has worked in funds management business development for the past 15 years and this broad experience provides him with in-depth product knowledge across a broad range of asset classes, including Australian and global equities, fixed income and alternative investments.

Mr McIntyre said Mr Levinge and Mr Fletcher will be responsible for 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 and retail investors respectively.

"These senior appointments will ensure GSFM maintains a dedicated focus of senior staff on servicing clients in the institutional and the retail space," Mr McIntyre said.

"In line with our business growth goals, GSFM now has funds under management in Australia of \$6.4 billion, made up of \$4 billion from institutional clients and \$2.4 billion from retail clients, and we are on track to expand on this during 2017.

“Charles has a proven track record of success at Franklin Templeton, and his experience in business development and human resources management means he brings a unique skill set to the role.

“With more than eight years experience at GSFM, Stephen brings a solid understanding of the retail business as well as established industry connections to his new position.”

Mr Levinge has an MBA from Macquarie University Graduate School of Business and a post graduate diploma in Human Resource Management from Macquarie Graduate School of Management.

Mr Fletcher has a Graduate Diploma of Commerce and an Advanced Diploma of Financial Services. He is currently studying towards a Master of Commerce at Deakin University.

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Grant Samuel Funds Management (GSFM) was established in July 2007 as a subsidiary of the Grant Samuel Group. In November 2016 CI Financial Corp (CI) purchased an 80 per cent stake in the business. CI is a diversified wealth management firm with assets under management of CAD\$117.4 billion (as of 31 January, 2017). GSFM specialises 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 \$6.4 billion funds under management (as at 30 January 2017). For more information about GSFM please visit the website: www.gsfm.com.au