

# AFA appoints GenXt chair for NSW



JO BRASSETT

THE ASSOCIATION OF FINANCIAL ADVISERS (AFA) has appointed **Jo Brassett** as its new GenXt chair for New South Wales.

Brassett, who succeeds **Paul Banner** in the position, is a financial adviser with a self-licensed firm, Insurance Advisory Service, as well as a company shareholder.

She has been an AFA member for a number of years and said she was excited about taking on her first formal role with the association.

Sitting on the national GenXt committee, she will be

involved in making the AFA's value proposition applicable to the next generation of advisers, as well as assist in arranging local and national GenXt events, roadshows and workshops.

She will also be involved in encouraging GenXt advisers to be paired with more senior advisers as part of the AFA's SOS (Secrets of Success) mentoring program.

As part of the program, newer advisers meet once a month with a more experienced adviser to discuss issues, challenges and opportunities. ◀

distribution network.

The appointment represents something of a homecoming for **Ihlenfeldt**, who joined from WHTM Investment Group, which has a majority stake in Pinnacle, the group said.

He played a significant role in the initial establishment of Pin in 2006 and was a non-executive director of the group from 2006 to 2009.

In his most recent role at WHTM, he was head of wealth management.

**RENNELONG LONG SHORT EQUITY MANAGEMENT** has appointed

**Michael Baker** as an investment analyst to further deepen the absolute return manager's research capability.

Baker joins **Richard Fish and Taylor** within the business, where he will be responsible for analysing stocks and markets.

He has a wealth of asset management experience, most recently with MM&E Capital, where he was chief investment officer responsible for co-managing two absolute return funds, fundamental analysis of listed securities and generating investment ideas, as well as providing input into asset allocation for the business's core investment strategies.

**COLONIAL FIRST STATE GLOBAL ASSET MANAGEMENT** veteran

**Martin Littler** has stepped back as manager of the Australian equity core team and will instead focus on growing the Australian Share 1 Short Core Fund.

**Matthew Reynolds**, who is currently the team's deputy head, will succeed Littler as head of the core team in late February.

Reynolds' promotion should be seen as a next stage of a broad succession plan, Standard & Poor's Fund Services associate **Andre** said. ◀

Dealer group **MATRIX PLANNING SOLUTIONS** has hired **Tanya Seale** to fulfil the role of practice development manager.

In this job, Seale will work alongside Matrix practice development general manager **Geoff Martin** in assisting advisers to further develop their business models and support their strategic advice and service package offerings to clients.

Seale has been a compliance manager for Matrix for the past four years and brings to the role strong technical planning knowledge and experience working with practices to implement compliance processes.

"I look forward to working closely with practices on a range of areas, building on my compliance experience and helping member firms to grow," she said.

ANZ-owned financial services firm **ONEPATH** has hired **Claude Lombardo** to the position of group underwriting manager, reporting to the chief underwriter.

Lombardo has more than 30 years' experience in the financial services industry and during that time has worked for a number of life insurers and reinsurers in specialist underwriting and claims roles.

In his new position, he will be

responsible for managing OnePath's group risk underwriting team and will work closely with OnePath's internal and external stakeholders to further enhance its established presence in the group risk market.

Listed life insurer **TOWER AUSTRALIA** has appointed **Andrew Boldeman** to the position of chief executive of its group life business.

Boldeman, who was previously head of group life for Tower, brings with him 20 years of experience in various senior financial services roles and will now join the senior executive team, reporting directly to managing director **Jim Minto**.

He takes over the executive responsibility as chief executive of the group life business from **Geoff Black**, who was previously chief executive of group life and investments.

Black will continue to be chief executive of investments, however, he will be able to narrow his focus to this area of the business specifically.

Financial services company **EQUITY TRUSTEES (EQT)** has hired **Ryan Bessemer** as head of business systems and information technology.

Bessemer has more than 19 years' experience in information technology through jobs with Austock Group,

consulting firm **Volante/Ipex** and software developer **Software Spectrum International** (now **Insight Enterprises**).

He will be responsible for ensuring the continuing upgrade of EQT's technology systems and processes to both support business development and meet regulatory and client needs and expectations.

The company has also made appointments to its corporate fiduciary and financial services group.

Former EQT senior manager **Russell Beasley** has been appointed to the newly-created position of EQT corporate fiduciary services national manager, where he will be responsible for maintaining and developing EQT's responsible entity services.

**Kylie Holbrook** has joined the business from **Perpetual** as EQT corporate fiduciary services senior manager, reporting to Beasley.

Holbrook will be based in Sydney and have responsibility for servicing and expanding EQT's responsible entity business's growing base.

**PINNACLE INVESTMENT**

**MANAGEMENT** has appointed **Alex Ihlenfeldt** to the newly-created role of chief operating officer as the boutique funds management group grows its manager base and third-party