



ANNUAL GREAT DEBATE BREAKFAST

Kate Skilleter

Kate Skilleter is a Director with ABN AMRO Morgans Ltd, the national financial advisory firm where she is transforming Morgans' wrap platform through a programme of IT investment and cultural change, and is responsible for the needs of ABN AMRO Morgans' branch network.

Prior to working for Morgans, Kate was Chief Operating Officer with Ergon Energy's Powerdirect Australia business. Under her leadership, Powerdirect Australia grew to become one of Australia's top five energy retailers, providing innovative energy solutions and services to a diverse customer base ranging from domestic and small business customers to large mines and airports.

In 2006 Kate won *Queensland Business Review's* Public Sector "Women in Business" award and was a Queensland finalist in the Hudson Community and Government Award category of the Telstra Business Women's Awards. Kate also undertakes philanthropic work for the homeless as well as being a board member for the Queensland Music Festival board.

Anne Gately

Anne Gately is Senior Business Development Manager at Blake Dawson and is responsible for business development support for the Energy & Resources practice which spans Australia. She also leads a small team of business development and marketing specialists who support Blake Dawson's broader practice in Brisbane and Perth.

Anne specialises in the professional services sector and has a background in coaching executives in presentation skills, selling skills and new business development techniques.

Anne actively pursues opportunities to practise what she preaches and is a regular speaker at conferences, motivational session and training programs. Her current areas of interest include the art of fierce conversations, development of resilience, and the value of human connectivity in business. With background that includes 13 years in the education and arts sectors, Anne places great value in improving leadership and management skills of all Australians but particularly of women.

Rachel Elfverson

With almost 20 years in the Banking and Financial Services industry, Rachel has spent the last 8 years with Asgard Wealth Solutions (formally Sealcorp) which now forms parts of the BT Financial Group. Holding such diverse roles as Compliance Manager and Business Development Consultant, Rachel now assists financial advisers as the Practice Implementation Manager for the Qld region.

Rachel holds a Diploma of Financial Services (Fin. Planning) and a Diploma of Mortgage Lending through FINSIA of which she is a Senior Associate.



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John Kennedy

Hailing from Belfast in Northern Ireland, John arrived in not so sunny Brisbane in 1974, just after the floods! Joining Metropolitan Permanent Building Society, John worked his way through the ranks over a period of 17 years, firstly as a branch manager then Business development officer and finally becoming the first internal Financial Adviser for the Metway Bank (as it became to be known).

After 34 years in the finance game, John is now a Director of his own company KR Securities, a boutique Financial Planning group located at West End specializing in Self Managed Super Administration and advice.

John is married to Kristen (a school teacher) and has three sons. His interests include music (John is currently President of the BGS Music Support) and football. In recent years he has followed the Socceroos to Germany and Thailand and is looking forward to a trip to the World Cup soccer in South Africa next year.

Claude Santucci

Claude started his career in financial planning with Pembroke Financial Planners in July 1987. He moved on to Buck Consultants in 1995 and in 2000, together with his friend and colleague Jacqueline Parker, started HN Financial Partners Pty Ltd a boutique financial planning and corporate superannuation advisory firm in the Brisbane CBD.

He is the current President of the Boutique Financial Planning Principals Group (BFPPG). This role provides him with the opportunity to give back to the industry through the smaller and independently owned financial planning practices where he believes the future of quality advice lies.

After more than 21 years as a financial planning adviser Claude has stepped away from front-line client contact to help smaller businesses improve their operations through practical efficiencies and streamlined processes.

Claude's relationships with other advisers and institutions, continues on a strong basis given his long involvement with the business and the friendships he has built up over the years.

Dermot Lindsay

Born in Dublin, Ireland, Dermot has travelled the globe a couple of times before living in London for a couple of years, it was during this time that he realised he wanted to call Australia home. After spending eight years with Boral Construction Materials and Origin Energy he took up the position of Treasury Manager with Colonial Margin Lending in 2000.

It was in this role that he started to build his experience in the financial services industry and eventually moved to AM Corporation as their Qld Business Development Manager, and then later accepted the position of Queensland State Manager and remained in this role when IOOF purchased AM Corporation in 2003. In May 2006 he was delighted to take up the role of Qld State Manager with Aviva and has enjoyed bringing together a strong sales and sales support team over the last three years.

He has successfully completed his DFS (Financial Planning), ADFS (Financial Planning) and just recently graduated with a Master of Financial Planning from Sunshine Coast University.

His biggest challenges to date are understanding the ever changing personalities of his staff, coaching his daughters Gemma (7) and Chelsea (10) respective football teams, and holding back the push (from both daughters and wife Karen) to buy a puppy dog.