



## FEMALE TEAM

**Kate Farrar** is the Managing Director of QEnergy, a new Queensland electricity company focused on helping small businesses in Queensland with their electricity costs. Kate has substantial electricity market experience, having been Chief Operating Officer of Ergon Energy's Powerdirect Australia business. Under her leadership, Powerdirect Australia grew to become one of Australia's top five energy retailers covering a diverse customer base ranging from domestic and small business customers to large mines and airports. In 2007 Kate led the sale of Powerdirect to AGL for \$1.2bn, \$0.5bn above expectations. Kate was previously a Director with ABN AMRO Morgans (now RBS Morgans), the national financial advisory firm. 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 undertakes philanthropic work for the homeless and the Mater Foundation as well as being the Chair of the Queensland Music Festival.

**Rachel Elfverson** is the Practice Development Manager, Dealer Groups and Licensee Select with BT Financial Group. With almost 20 years in the Banking and Financial Services industry, Rachel's experience has included diverse roles that have included Retail banking, Lending, Compliance, Business Development and Practice Implementation. Now as Practice Development Manager for the Qld region she assists financial advisers to develop and grow their businesses. Rachel holds a Diploma of Financial Services (Fin. Planning), a Diploma of Mortgage Lending and is a Senior Associate of FINSIA.

**Karen Masnata** is a Director in Deloitte's Corporate Finance Group. Karen joined Deloitte in 2008 and specialises in providing advisory services to the energy, resources and water industries, as well as to the Government sector more broadly. Before joining Deloitte, Karen spent 12 years working at Queensland Treasury Corporation and Queensland Treasury providing financial advisory services to the Queensland Government sector. Her public sector experience focussed on infrastructure procurement and financing, including PPPs; major development projects, particularly in the Government Owned Corporation sector; assisting in industry restructures, including the energy industry following the sale by the State of its electricity retailing businesses.



## MALE TEAM

**Simon Rogers** is as a Senior Private Wealth Adviser with Managed Financial Strategy. Among other roles, Simon has worked for the Metropolitan Police Service in London as an Investigator and the Economic Crimes Unit at New Scotland Yard as a Specialist Investigator pursuing major corporate fraud and money laundering investigations. In 2002 Simon emigrated from London and formalised his expertise in financial services with the Diploma of Financial Services (Financial Planning). He became an Authorised Representative of Wright Global Investments in Sydney, and a Specialist Manager of absolute return strategies in the fund of funds business in the Americas, Asia and Australia. In 2005 Simon became an Authorised Representative and Business Development Manager with Financial Wealth where he worked closely with the Managing Director to recruit advisers, consult to their practices and build brand awareness in the market. In 2007 Simon joined QTCU Financial Planning as a Senior Private Client Adviser.

**Paul Betti** is the Founder of the AFA Group, he has over 25 years experience as a financial planner & and Certified Financial Planner (CFP). After serving 25 years in management, and over 15 years as CEO, Paul has a strong understanding of industry issues impacting the financial planning sector. The AFA Group is a diverse business structure, including a national financial planning franchise, insurance broking, software development, finance, and also sports and events management.

**Jeremy Paterson** is the State General Manager for Alliance Recruitment. He has a background which spans some seventeen years within the financial services industry. The first 12 years of Jeremy's career was spent with the Royal Bank of Scotland in Edinburgh where he held a number of positions from Retail Banking to Senior Relationship Manager within in their Corporate Banking Sector. In 2005 Jeremy immigrated to Australia where he was approached to head up a Banking and Finance division for a global recruitment firm based out of Adelaide. Towards the end of 2008 he then finally settled in Brisbane and again took up another management position with Alliance and ultimately ended up becoming the State General Manager.