



WEALTH MANAGEMENT RECRUITMENT PROFESSIONALS

Superannuation | Life Insurance | Investments

QTR 2  
**2023**

QUARTERLY

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# INDUSTRY NEWSLETTER

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### Welcome to a new quarter at B&K Consulting!

As we step into a new quarter, we are excited to bring you the latest updates and insights from the world of wealth management.

This edition will delve into the dynamic business landscape undergoing a profound shift driven by six key transformations that redefine how organisations operate and succeed. These transformations encompass technological advancements, changing workforce dynamics, evolving customer expectations, sustainability imperatives, agile business models, and data-driven decision-making.

We are also thrilled to see the success stories of individuals who have found their dream roles through our recruitment services. Their journeys testify to our commitment to matching talented professionals with reputable organisations, fostering mutually beneficial partnerships that drive success.

We hope you enjoy reading our newsletter!

All the best, John & Adrian.

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We are always keeping up with the industry. Check out what we've been up to this quarter.

\*Disclaimer: Information from this newsletter came from multiple reputable online news sources including The Financial Standard, The Australian Financial Review, Industry Moves and Australian Securities & Investments Commission to name a few. Each bullet point contains a link to the source article.



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## The Top 6 Transformations Reshaping Organisations Today: Embracing the Change

Various organisational shifts are underway in the fast-paced and ever-evolving business landscape, with profound implications for structures, processes, and people.

These shifts encompass complex inquiries about optimising speed for enhanced resilience, striking the right balance between in-person and remote work models, tackling employees' declining mental health, and fostering new institutional capabilities amidst rapid technological advancements, changing market dynamics, and shifting customer expectations.

This article will explore the top six significant transformations impacting organisations in Australia today.



### 1. The Digital Transformation

In today's hyper-connected world, digital technologies are reshaping the landscape of organisations across industries. Digital transformation has become imperative for businesses seeking to stay competitive, relevant, and agile in an ever-evolving marketplace. The rapid evolution of technologies like cloud computing, artificial intelligence and data analytics has opened new possibilities for businesses to innovate and optimise their operations. Organisations are already harnessing AI to establish sustainable talent pipelines, significantly enhance operational methodologies, and implement rapid, data-driven structural adjustments. It has dramatically helped them to improve efficiency and has brought greater flexibility.

However, digitalisation comes with its challenges, and as technology continues to evolve, the journey of digital transformation is ongoing, and organisations must remain agile, adaptable, and open to embracing emerging technologies to stay ahead in the competitive global market.





# The Top 6 Transformations Reshaping Organisations Today: Embracing the Change

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## 2. Hybrid Work Revolution: Redefining the Blend of In-Person and Remote Work

The world of work has undergone a remarkable shift over the past few years, and one key catalyst behind this transformation is the Remote Work Revolution. Accelerated by global events and technological advancements, remote work has become a powerful force reshaping traditional work dynamics. Indeed, following the COVID-19 pandemic, approximately 90 per cent of organisations have adopted diverse hybrid work models, granting employees the flexibility to work from off-site locations.

It is a catalyst for innovation, and its opportunities shape the work's future in ways we are yet to explore and appreciate fully. The benefits of remote work must be embraced while addressing its challenges to create thriving, agile, and inclusive workplaces.

## 3. Data-Driven Decision Making

In today's data-driven world, businesses are leveraging the power of data analytics to unlock valuable insights and gain a competitive edge. Data analytics is revolutionising organisations' operations, empowering them to make informed decisions, optimise processes, and deliver personalised customer experiences. Businesses can move from intuition-based decisions to fact-based strategies by harnessing data insights.



Data analytics has many advantages: First, the ability to streamline and optimise business processes. By analysing operational data, organisations can identify bottlenecks, inefficiencies, and areas for improvement. Then, data analytics enables organisations to collect and analyse customer data, gaining valuable insights into their behaviour, preferences, and purchase history. With this information, businesses can create personalised marketing campaigns and customer service, fostering greater customer loyalty and satisfaction.

While data analytics offers substantial benefits, organisations must navigate a few challenges, such as data security and protection of sensitive information, complying with data privacy regulations, and ensuring data accuracy and integration from various sources, which can be complex but essential for reliable insights.

## 4. Achieving Significant Advancements in Diversity, Equity, and Inclusion

DEI is gaining traction in corporate agendas. Organisations are fostering diverse and inclusive workplaces, recognising the value of diverse perspectives in driving innovation and positive work culture.

## The Top 6 Transformations Reshaping Organisations in Australia Today: Embracing the Change

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However, in numerous instances, these initiatives fail to result in tangible advancements. To achieve their Diversity, Equity, and Inclusion (DEI) aspirations, leaders must identify opportunities for progress both within their organisations and in the wider community and society.

### 5. Sustainability and ESG Focus

In recent years, the world has witnessed a remarkable shift in how organisations perceive their responsibilities beyond profit-making. Sustainability and Environmental, Social, and Governance (ESG) factors have gained significant traction, driving organisations to align their strategies and operations with the principles of sustainable development. Indeed, mounting concerns over climate change, resource depletion, social inequality, and governance failures have prompted a growing consensus on the need for more responsible and sustainable business practices. This transition signifies a profound corporate transformation, where businesses increasingly acknowledge their impact on the planet, society, and long-term viability.

Companies with strong sustainability and ESG credentials foster a positive reputation and tend to outperform their peers regarding long-term financial returns. By integrating these principles into their core strategies and operations, organisations can drive positive impacts, create value, and ensure long-term resilience.

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### 6. Employees Well-Being at The Center

The traditional notion of a rigid work environment, where employees were expected to sacrifice personal well-being for the company's success, is fading away. Modern businesses understand that a healthy and engaged workforce is the backbone of organisational prosperity. As a result, employee well-being is now being viewed as an essential aspect of corporate culture, employee engagement, and long-term success. Organisations are adopting flexible work arrangements, remote work policies, and generous time off to empower employees to manage their professional and personal responsibilities effectively.

Emphasising employees' well-being as a central focus of businesses is a transformative approach that can yield significant benefits. When employees feel supported, respected, and empowered, they drive a company's success. A culture that values well-being enhances individual lives and fosters a positive and resilient work environment. By recognising the crucial role of employees' well-being and implementing appropriate initiatives, organisations can create a motivated, productive workforce committed to achieving shared goals.

If You Have Any Questions, Feel Free to Reach Out.

## MARKET RECAP

### Announced April

- **BT** and **Striver** launch a program to tackle the financial advice industry's talent shortage, using a tech-based human resources platform and guiding new entrants towards the profession. [more>](#)
- **The Clean Energy Finance Corporation (CEFC)** commits up to \$80 million in a private equity fund that will invest in a range of mid-market companies while driving decarbonisation at the same time. [more>](#)
- **Global X** launches a new Australian equity ETF; to provide more exposure to the country's largest companies while avoiding doubling up on bank, mining and energy shares. [more>](#)
- **The latest Australian Institute of Company Directors (AICD) Gender Diversity Report** shows that women's representation on boards stood at 36 per cent in the ASX 200 and 35.5 per cent in the ASX 300 at the end of February. [more>](#)
- In its latest Landscape reports, **Adviser Ratings** examines what you can expect from the average financial adviser in Australia. [more>](#)
- **GBST** announces its acquisition of WealthConnect, a digital advice practice management and customer relationship management (CRM) system to assist advisers in managing client relationships, portfolios and administration through a more streamlined workflow. [more>](#)
- **Abrdn** Head of Retirement and Digital Innovation Jason Nyilas, Advice Intelligence CEO Jacqui Henderson, Money GPS Founder George Haramis and Ignition Advice Global Head of Strategy and Corporate Services Andrew Baker create a new industry association to support the Quality of Advice Review (QAR) proposed reforms and serve as a united voice before the government. [more>](#)
- **AIA Australia (AIA)** launches incentives for life insurance customers showing healthy behaviours as part of its retail insurance offering. [more>](#)
- **HUB24** enters a Heads of Agreement with Equity Trustees to provide custodial platform administration and technology solutions. [more>](#)
- **Pinnacle** reports a significant decline in net profit after tax for the first half of the financial year, with a fall of 24 per cent. [more>](#)
- **New Roy Morgan** research finds that women's average superannuation balances are growing faster than men's while ownership levels have also risen. [more>](#)
- **SuperConcepts** partners with **Smarter SMSF**, integrating SuperMate and the documentation platform for streamlined SMSF administration. [more>](#)
- **Viridian Financial Group** acquires a Queensland-based boutique advisory firm with plans to leverage its use of video Statements of Advice (SoAs). [more>](#)



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## MARKET RECAP CONTINUED

### Announced May

- **HESTA** renews its mandate with AIA Australia and makes changes to its insurance offering. [more >](#)
- **KPMG**'s report announces a "massive" market share increase for industry funds, growing from 31% to 37% in the year ending 30 June 2022. [more >](#)
- **Magellan Financial Group** announces a drop in its total funds under management (FUM), falling a further \$0.5 billion. [more >](#)
- Ord Minnett pays \$888k to comply with an infringement notice from the Markets Disciplinary Panel regarding a buy-back. [more>](#)
- **BetaShares and BlackRock** welcome two new exchange-traded funds (ETFs), with a focus on developed markets, infrastructure and real estate trusts (REITs). [more>](#)
- Following the acquisition of Advance Asset Management and the transfer of BT Super, **BT's** Private Portfolio Management (PPM) business will transition to **Mercer** later this year. [more >](#)
- **HUB24** expands its relationship with HR technology platform **Striver**; to provide more educational resources for financial advisers. [more >](#)
- Latest report from **APRA** shows the cost of professional indemnity insurance increased at least 40% for financial advisers since 2015. [more >](#)
- **Mine Super** closes one of its Choice investment options, recently highlighted by APRA as an underperformer. [more >](#)
- **UBS** announces its intended operating model and leadership team ahead of formally integrating Credit Suisse; to keep the companies and brands separate. [more >](#)
- **AMP** is recognised guilty of charging deceased customers life insurance premiums and advice fees and pays \$24 million in penalties. [more >](#)
- **BlackRock Australia** order all employees to return to the office for four days from September this year; to affect all 19,000 staff members. [more >](#)
- **Cbus** announces a new investment strategy, focused on lucrative global partnerships and boosting internal asset management to 50%. [more >](#)
- **Raiz Invest** launches a diversified residential property fund; to allow investors to dedicate up to 30% of their portfolio to a variety of residential properties nationwide. [more >](#)



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## MARKET RECAP CONTINUED

### Announced June

- **Adviser Ratings'** wealth data and ARdata announce its acquisition of investment and superannuation system ProductRex. [more >](#)
- **ASIC** pushes back deadline to register on ASIC's Financial Advisers Register until October 1 2023. [more >](#)
- **Count** announces the successful acquisition of financial advice business Affinia from TAL and welcome around 100 advisers to its national community. [more >](#)
- **HESTA** calls for an extension of compulsory Superannuation Guarantee (SG) benefits to workers in the gig economy, amid concerns these workers will be "vulnerable to poverty" later in life. [more >](#)
- **JPMorgan Chase** welcomes to trademark a product called IndexGPT using artificial intelligence towards selecting investments for customers. [more >](#)
- **Sequoia Financial Group** divests 80% of its equity interest in the stockbroker to New Quantum a digital wealth platform for \$40.5 million. [more>v](#)
- **AMP** adds a streamlined process to prepare records of advice (ROA) on its North platform; to save advisers' time, improve data accuracy, and better show the impact of investment switch transactions. [more >](#)
- **AUSTRAC** concludes its external audit of **Bell Financial Group** after more than a year and announces it will "not be taking any further regulatory action". [more >](#)
- **BlackRock Alternatives** secures over \$500 million from Australian and global institutional and sovereign co-investors to expedite the development of the Waratah Super Battery. [more >](#)
- **Crosby Dalwood and Warnecke & Co**, two leading advisory firms in South Australia merge and rebrand as **Count Adelaide** from July 2023; to combine more than 70 years of experience in accounting and wealth advisory services. [more >](#)
- **TelstraSuper** makes changes to its investment menu and introduces a new option for accumulation and TTR members from next month, the Moderate investment option. [more >](#)
- **Wealth Data** announces a large loss of 46 advisers for the week with current adviser numbers standing at 15,735 with a net change of -452 for the financial year to date. [more >](#)

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# INDUSTRY

## MOVEMENTS

### Announced April

- Antipodes welcomes **Vihari Rossas** as its new Portfolio Manager, to be Magellan's former Head of Research. [more >](#)
- Australian Retirement Trust's Head of Strategy for the QSuper Portfolios, **Damian Lillicrap**, departs the fund after 13 years; to follow the appointment of **Andrew Fisher** as Head of the Investment Strategy for both the super savings and QSuper portfolios. [more >](#)
- Cbus Chief Executive **Justin Arter** steps down from the \$73 billion industry fund; to retire following the merger between Media Super and EISS Super. [more >](#)
- GCM Grosvenor opens an office in Sydney and welcomes **Andy Lukas** as its new Managing Director of Australia and New Zealand Operations. [more >](#)
- Pengana Capital's Non-Executive Director, **Warwick Negus**, retires from the board and becomes the Bank of Queensland (BOQ) chairman. [more >](#)
- UBS welcomes back former Chief Executive Officer **Sergio Ermotti** to lead Credit Suisse's takeover; to replace current CEO **Ralph Hamers**. [more >](#)
- Bravura Solutions welcomes Former Class' Chief Executive, Andrew Russell, as its new Interim Chair; to follow the departure of Neil Broekhuizen from the Bravura board after 14 years. [more >](#)
- Franklin Templeton appoints **James Andrus** as its new Vice President of Sustainability Global Markets within Franklin Templeton's Global Sustainability Strategy Team. [more >](#)
- Following handover of Abridn Australian equities business to SG Hiscock, **Hamish Tadgell** takes over as Lead Portfolio Manager; to work alongside an eight-person ASX300 research team. [more >](#)
- Intelliflo welcomes **Kate Fellows and Aaron Thiele** as new Business Development Managers to drive ongoing expansion following its full-scale market launch in March. [more >](#)
- Mercer welcomes **Andrew Wallace and Corrin Collocott**, two executive appointments following the completed merger of BT Super into Mercer Super Trust. [more >](#)
- Spark Invest platform launches a digital investing solution with five diversified portfolios; to be managed by Spark's Chief Investment Officer Andrew Coloretti and its wider investment team. [more >](#)
- Allianz Australia announces **Shez Ford** as its new Chief General Manager, Consumer; to lead Allianz's Consumer Division. [more >](#)
- AMP promotes Senior Economist **Diana Mousina** to the role of Deputy Chief Economist, working alongside **Shane Oliver**. [more >](#)

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# INDUSTRY

## MOVEMENTS

### Announced May

- Australian Retirement Trust promotes **Nick Horn** to Head of Investment Risk and **Bridget Piggott** to Head of Risk. [more >](#)
- BetaShares appoints two Senior Executives to lead distribution and client service efforts across four Australian states; **John Bezich** as State Manager for Western Australia, along with **Blair Modica** as State Manager for Victoria, South Australia, and Tasmania. [more >](#)
- Citi promotes interim Country Officer **Mark Woodruff** to the role of Chief Executive, Australia and Head of Citi's Australia and New Zealand cluster. [more >](#)
- Janus Henderson Investment strategist **Frank Uhlenbruch** departs after 28 years at Janus Henderson and almost 40 years in fund management. [more >](#)
- HESTA welcomes Pitcher Partners' **Sue Dahn**, an FS Power50 Financial Adviser, to its board and investment committee. [more >](#)
- Ord Minnett appoints Former Olympic rower **Frank Hegerty** as its new Head of Private Wealth; to have over 18 years' experience in the financial services industry. [more >](#)
- Perpetual small-cap Manager, **Jack Collopy** departs after more than 20 years; two Co-Portfolio Managers to take over. [more >](#)
- AustralianSuper's Head of Allocation and Research **Carl Astorri** relocates to the asset owner's burgeoning London office after eight years working at Australian Super. [more >](#)
- Innova Asset Management announces **Laurence Gamboa** as its new Head of Distribution, as it looks to grow its profile among non-aligned financial advisers and dealer groups. [more >](#)
- MLC Life Insurance appoints **Hiroyuki Endo** as its new Chief Investment Officer and Deputy Chief Financial Officer. [more >](#)
- PwC Chief **Tom Seymour** departs the business following his involvement in the firm's tax leak breach; PwC assurance leader **Kristin Stubbins** to take over in the interim. [more >](#)
- Cbus Super Chair **Wayne Swan** announces that the industry super fund welcomes 17,000 new members into Cbus following its merger with EISS Super. [more >](#)
- Praemium appoints **Richard Large** as its new Chief Technology Officer; to be responsible for developing and executing the company's technology strategy. [more >](#)



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## MOVEMENTS

### Announced June

- ANZ welcomes **Maria Milosavas** its new Chief Information Security Officer (CISO); to replace Lynwen Connick, who will retire after six years in the role. [more >](#)
- FNZ appoints **Kirsty Gross** as a Non-Executive Director of FNZ Custodian; to underpin FNZ's expansion goals into the wider Asia-Pacific region. [more >](#)
- Frontier Advisors restructures its research team and appoints **Andrew Kemp** as its new Head of Defensive Assets and Private Markets. [more >](#)
- HUB24 appoints **Rachel Grimes** as Non-Executive Director; to serve as a member of the audit, risk and compliance committee. [more >](#)
- Janus Henderson Investment strategist **Frank Uhlenbruch** departs after 28 years at Janus Henderson and almost 40 years in fund management. [more >](#)
- Spirit Super Chief Executive Jason Murray leads the new super fund created by the merger of the Spirit Super and CareSuper; to be chaired by **Linda Scott**. [more >](#)
- Stake appoints former Perpetual and MLC Chief Executive **Geoff Llyod** as its new Chair. [more>](#)
- Active Super and Vision Super sign a Heads of Agreement and appoint **Stephen Rowe** to the role of Chief Executive Officer of the merged fund. [more >](#)
- Ignition Advice announces the appointment of **Sally Loane** as its new Chair; to succeed Peter Meurer who was the firm's inaugural Chair. [more>](#)
- INGS Super appoints **Natalie Previtera** as its new Chief Executive Officer, following an extensive national recruitment process. [more >](#)
- AMP Capital ESG Head ESG **Adam Kirkman** departs after 12 years; an exit to follow the decision by the board to sell AMP Capital's global public and private markets division. [more >](#)
- Australian Retirement Trust (ART) appoints **Kathy Vincent** as its new Chief of Retirement; to join the superannuation fund in December and focus on implementing ART's retirement strategy. [more>](#)
- Cbus introduces **Brett Chatfield** as its new Chief Investment Officer; to have an extensive career in the finance industry for over two decades. [more>](#)
- Pengana Capital Group names **Nehemiah Richardson** as its new Managing Director and Chief Executive and **Charles Finkelstein** as its new Chief Investment Officer. [more>](#)



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# B&K

CATCH UP

# What we've BEEN UP TO THIS QUARTER



## April & May

We celebrated Anel's and Max's **first work anniversary** at B & K. Congrats for all the hard work and dedication as our team talent.



Alexia, our Marketing Manager, was awarded the **Player of the Quarter** title. Congrats! Her remarkable drive, unwavering positive attitude have genuinely set her apart.

Adrian and John attended one of Association of Superannuation Funds of Australia (ASFA)'s popular Budget lunch events in Sydney at The Fullerton Hotel Sydney, to unpack the **Government's first total Budget** and clarify the specific implications for superannuation.



John and Alexia participated in **Qualtrics X4**, organised by Qualtrics and discovered the latest innovations in Experience Management that are helping organisations be more human and thrive during uncertainty with agility and empathy.



**Happy two-year work anniversary** to our Life Insurance Superstar, Kevin Pickard. Your dedication, professionalism, and energy inspire us all.

## June



Cindy & John attended Navigator Consulting & Research's, highly informative presentation on **"End of Financial Year Must-Dos for Business"**.



**TalentX** organised by RCSA Australia and New Zealand.



The whole team participated in the **#biggestmorningtea event**, Australia's most anticipated fundraising initiative in support of the Cancer Council Australia. A morning filled with camaraderie and sweet treats at the office!

To stay up to date on industry news and movements, as well as what we're up to, [follow us on LINKEDIN](#)





## ROLES WE RECRUIT IN

### Insurance & Reinsurance

- Actuarial – Pricing, Valuations, Capital
- Product
- Distribution - Relationship Managers & BDM's
- Claims
- Risk & Compliance
- Operations – Contact Centre (Sales and Service) and Administration
- Disputes and Complaints

### Superannuation

- Actuarial
- Product
- Operations - Contact Centre & Administration
- Distribution - Relationship Managers & BDM's
- Research & Consulting
- Risk & Compliance

### Retirement

- Actuarial
- Product
- Distribution – Relationship Managers and Business Development Managers
- Operations - Contact Centre & Administration

### Investment Management

- Leadership Roles (Team Leader – General Manager)
- Investment Analysts
- Distribution – Business Development, Relationship Management & Product Investment Operations
- Risk And Compliance
- Fund Accountants
- Marketing & Communications
- Product

### Fintech

- Customer Success / Experience

# ABOUT B & K



## IN FOCUS

### INVESTMENT CAREER SPECIALISTS

Interested in the Fund Management space and the services that come with it?

At B&K, we have two dedicated Consultants, John Molony and Garret Folan, who specialise in recruiting operational and distribution based roles.

If your office is in need of some investment management career support, don't hesitate to reach out to [john@bkcon.com.au](mailto:john@bkcon.com.au) or [garret@bkcon.com.au](mailto:garret@bkcon.com.au)

B & K Consulting specialise in recruitment for superannuation, life insurance and investment professionals - for both temporary and permanent positions.

As we solely specialise in the wealth management industry, it allows us to become experts in what we do, enabling us to provide honest, personalised, and thorough services tailored to our clients' specific needs. Understanding your business and background is essential to finding you the best solution.