

From: Super Members Council of Australia <info@smcaustralia.com>

Sent: Tuesday, September 19, 2023 12:43 PM

Subject: The Super Members Council of Australia: A strong voice for more than 10 million Australians

Dear Colleagues

A public statement was issued today by Nicola Roxon in her capacity as Interim Chair of the Super Members Council of Australia, announcing that the new collective voice for profit-to-member superannuation funds will commence operations from 1 October 2023.

Media Statement

Jointly created by the super funds who were members of the Australian Institute of Superannuation Trustees (AIST) and Industry Super Australia (ISA), the new body will build on their impressive legacies, but with a new approach in a contemporary Australian economy.

The establishment of a single, compelling voice for profit-to-member superannuation funds reflects the growing stature and changing composition of the superannuation sector and will better serve the long-term interests of those Australians who entrust us to invest their superannuation savings.

We look forward to working with you all over the coming months.

Super Members Council of Australia

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19 September 2023

The Super Members Council of Australia: A strong voice for more than 10 million Australians

Australia's profit-to-member super funds have created a new collective body to be a strong voice for more than 10 million Australians.

The Super Members Council of Australia's primary purpose will be to protect and advance the interests of members throughout their lives, while earning superannuation at work and benefitting from it in their retirement.

Jointly created by the super funds who were members of Australian Institute of Superannuation Trustees (AIST) and Industry Super Australia (ISA), the new body will build on their impressive legacies and bring a new focus for the contemporary Australian economy.

Interim Chair Nicola Roxon said: "the Super Members Council will advocate for the interests of the more than 10 million Australians who belong to a profit-to-member super fund – to ensure superannuation policy is stable, effective and equitable."

"The nature of work and the workforce itself are changing, as are patterns and expectations in retirement. As many members' balances grow, those in lower paid or less secure work risk being left behind.

"The long-term interests of millions of Australians will be well served by a new collective body that can be a strong, thoughtful and compelling voice about superannuation policy, advocating to all levels of government and industry," Ms Roxon said.

"Our promise is member-centric advocacy that seeks to work with all political parties to deliver the best possible retirement outcomes for the millions of Australians we represent."

The Super Members Council will be an inclusive body, bringing together funds of all sizes to represent more than 10 million Australians who hold more than \$1.4 trillion in assets. It will be operational from 1 October 2023.

The foundation funds are eight of Australia's largest – Australian Retirement Trust, AustralianSuper, Aware Super, Cbus Super, HESTA, Hostplus, Rest Super and UniSuper.

The foundation funds have each nominated a director to the governing Board and look forward to welcoming three further directors chosen by the small-to-medium sized profit-to-member funds. An employee and employer representative will each join as non-voting directors.

A search for a Chief Executive Officer to lead the new Super Members Council is underway.

Media contact: s 47F

s 22

From: s 47F @australiansuper.com>
Sent: Friday, 22 September 2023 11:57 AM
To: Rayner, Karla
Cc: s 47F; s 47E(d)
Subject: RE: Request for meeting, Paul Schroder, CE AustralianSuper, Tuesday 10 October, Canberra [SEC=OFFICIAL]

Thanks Karla

s 47F

From: Rayner, Karla <Karla.Rayner@TREASURY.GOV.AU>
Sent: Friday, September 22, 2023 10:54 AM
To: s 47F @australiansuper.com>
Cc: s 47F @australiansuper.com>; s 47F @australiansuper.com>;
s 47F @australiansuper.com>; s 47E(d) @TREASURY.GOV.AU>
Subject: RE: Request for meeting, Paul Schroder, CE AustralianSuper, Tuesday 10 October, Canberra [SEC=OFFICIAL]

You don't often get email from karla.rayner@treasury.gov.au. [Learn why this is important](#)

OFFICIAL

Dear s 47F

Thank you for your email to Secretary Kennedy.

I will come back to you on this as Secretary Kennedy is s 22. If we can make it work, it will be in the morning.

Kind regards

Karla

Karla Rayner — Chief of Staff to the Secretary
P +61 2 6263 3093 M +s 22

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From: s 47F @australiansuper.com>
Sent: Thursday, September 21, 2023 4:58:23 PM (UTC+10:00) Canberra, Melbourne, Sydney
To: s 47E(d) @TREASURY.GOV.AU>
Cc: s 47F @australiansuper.com>; s 47F @australiansuper.com>;

s 47F [@australiansuper.com](mailto:s47f@australiansuper.com)>

Subject: Request for meeting, Paul Schroder, CE AustralianSuper, Tuesday 10 October, Canberra

Dear Dr Kennedy,

I hope you are well. I was hoping to organise a meeting between yourself and AustralianSuper's Chief Executive, Paul Schroder while Paul is in Canberra on **Tuesday, 10 October 2023**. Paul currently has availability in the morning and in the afternoon until 4pm that day.

Paul would be very keen to meet with you to discuss matters relating to the superannuation system such as retirement, including aged care, and Treasurer's Investor Roundtable topics.

Please don't hesitate to contact myself or s 47F, Head of Government Relations and Public Policy on s 47F if you or your team would like to discuss this request further.

Regards,

s 47F

s 47F

Manager, Government Relations and Public Policy

Strategy and Corporate Affairs

M: s 47F

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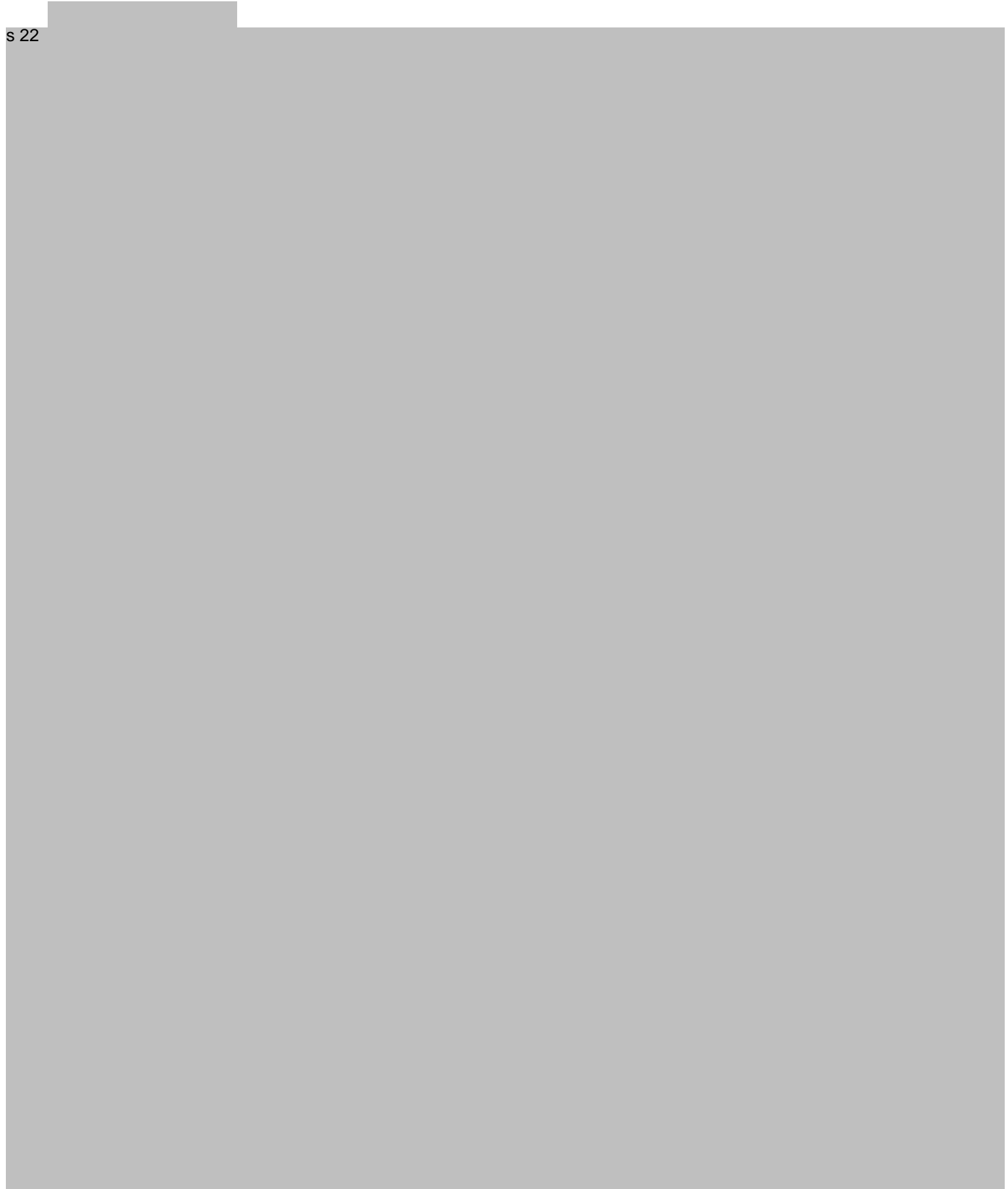
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s 22



-----Original Appointment-----

From: s 47E(d) [redacted] <[\[redacted\]@TREASURY.GOV.AU](mailto:[redacted]@TREASURY.GOV.AU)>

Sent: Thursday, 12 October 2023 2:15 PM

To: s 47E(d) [redacted]; Kennedy, Steven; Philp, Brenton;

s 47F [redacted]@aware.com.au'; 'sam.mostyn@aware.com.au'

Cc: s 47F [redacted]

Subject: 2:30pm | Aware Super Chair and CEO meeting with Secretary Kennedy [SEC=OFFICIAL]

When: Monday, 16 October 2023 2:30 PM-3:00 PM (UTC+10:00) Canberra, Melbourne, Sydney.

Where: TSY CBR Executive Dining Room and MS Teams

Thank you s 47F [redacted]

Confirming time for virtual meeting with Secretary Kennedy via MS Teams. Please reach out with any queries in the meantime.

Kind regards,

s 22 [redacted]

A/g Senior Executive Assistant to Dr Steven Kennedy

Secretary

P +s 22 [redacted]

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Aware Super CEO Deanne Stewart and Chair Sam Mostyn AO

The purpose of the meeting is to discuss issues of shared importance to Aware Super and The Treasury, including retirement and financial advice reform.

s 47F [redacted]


Senior Manager, Government Relations

M | +s 47F [redacted]

Level 28, 388 George Street, Sydney NSW 2000

[aware.com.au](#) s 47F [redacted] [@aware.com.au](#)

s 47E(d)





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From: Investor Roundtables
Sent: Wednesday, 12 April 2023 10:45 AM
To: sam mostyn
Cc: s 47F
Subject: RE: Treasurer's Investor Roundtable - 21 April 2023 [SEC=OFFICIAL]

OFFICIAL

Hi Sam,

Thank you for your email.

I can confirm this Roundtable is in-person only. We would be delighted if you could attend. If you can make it, please let us know and we will forward you on with agenda details in the coming days.

Best,

s 22
Regulator Engagement and Powers Unit
Financial Regulators Branch

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From: sam mostyn s 47F
Sent: Tuesday, 11 April 2023 10:02 PM
To: Investor Roundtables <InvestorRoundtables@TREASURY.GOV.AU>
Cc: s 47F
Subject: Re: Treasurer's Investor Roundtable - 21 April 2023 [SEC=OFFICIAL]

Dear s 22

Many thanks for chasing and my apologies for the delay in responding. I would like to attend the roundtable, and trying to work out if I can get to Brisbane that day. I presume it is an in-person event this time?

Best wishes,

Sam

Sam Mostyn
s 47F

Sent from my iPhone

On 11 Apr 2023, at 7:50 pm, Investor Roundtables <InvestorRoundtables@treasury.gov.au> wrote:

OFFICIAL

Hi Sam,

I hope this reaches you well after a refreshing Easter break.

We've been in touch with s 22 however haven't been able to reach you.

We are writing to you as the Treasurer has asked me to extend an invitation for you to attend the Treasurer's Investor Roundtable on Energy which will be held **in Brisbane on Friday, 21 April 2023 from 10:00am (for 10:30am start) to 12:00pm.**

The exact location of the Treasurer's Investor Roundtable will be confirmed shortly and the agenda and any supporting material will be sent in due course.

More information about the Roundtable is available here: [Treasurer's Investor...~https://ministers.treasury.gov.au/ministers/jim-chalmers-2022/media-releases/treasurers-investor-roundtable](https://ministers.treasury.gov.au/ministers/jim-chalmers-2022/media-releases/treasurers-investor-roundtable)

You can RSVP by reply email to InvestorRoundtables@Treasury.gov.au.

Please feel free to contact me on s 22 should you wish to discuss further.

Best,

s 22

Regulator Engagement and Powers Unit, Financial Regulators Branch
Financial Systems Division

P +s 22

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From: Investor Roundtables
Sent: Wednesday, 12 April 2023 6:32 PM
To: Investor Roundtables
Subject: Treasurer's Investor Roundtable on Energy - Invitation, Agenda and Venue [SEC=OFFICIAL]
Attachments: Investor Roundtable - Agenda - 21 April 2023 - FINAL (002).docx
Follow Up Flag: Follow up
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Dear Investor Roundtable on Energy attendees,

Further to the previous save the date email, please find attached an agenda for the Investor Roundtable on Energy **on Friday 21 April 2023**. Please consider this email to be a formal invitation.

The Investor Roundtable on Energy will be hosted at the Australian Retirement Trust's offices in Brisbane between 10:00am (for a 10:30am start) and 12:00pm. More details are below:

Location

Australian Retirement Trust
Level 28
266 George Street
Brisbane QLD 4000

Access

You are welcome to arrive from 10 am. On arrival please make your way to Level 28 where you will be met by staff to assist with check in.

Parking

There is a [Wilsons carpark](#) a short walk from the building.

If your Investor Roundtable participant has already RSVPed then there is no further need to RSVP again. I expect to be able to provide additional information, including a finalised attendee list shortly.

If you have any questions, please feel free to contact Treasury at InvestorRoundtables@Treasury.gov.au or me personally on s 22 .

Warm regards,

s 22

s 22

Director (a/g)
Financial System Division, Markets Group
E. s 22 [@Treasury.gov.au](mailto:InvestorRoundtables@Treasury.gov.au) M. s 22
The Treasury, 1 Langton Cres, Parkes, ACT 2603

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INVESTOR ROUNDTABLE ON ENERGY – 21 APRIL 2023

Time	Agenda item
10:00 – 10:30 30 minutes	Attendees arrive at Australian Retirement Trust, Level 28, 266 George St, Brisbane, QLD, 4000.
10:30– 10:35 5 minutes	Item 1. Introduction (Treasurer) – Acknowledgement of Country, update from previous Roundtable on Housing, energy roundtable objectives.
10:35– 10:45 10 minutes	Item 2. Policy Update (Minister Bowen) – Overview of key government energy initiatives underway
10:45 – 10:50 5 minutes	Item 3. Dr Alan Finkel / Technology Investment Advisory Council update.
10:50 – 10:55 5 minutes	Item 4. Professor Dawkins / Jobs and Skills Australia Update
10:55-11:25 30 minutes	Item 5. Industry Reflections – Opportunity for participants to reflect on their experience and the barriers and challenges to further investment, and discuss updates provided by Minister Bowen, Dr Finkel and Professor Dawkins.
11:25 – 11:55 30 minutes	Item 6. Governance and Enablers (Treasurer and Assistant Minister McAllister) – Update and discussion on sustainable finance agenda including next steps for industry and government. – Update and discussion by government on regulatory reform to support energy performance. – Opportunity for participants to reflect on their experience of sustainable finance, investing in energy performance, and the updates provided by the Treasurer and Assistant Minister McAllister.
11:55 – 12:00 5 minutes	Item 7. Conclusion (Treasurer) – Summary of outcomes, commitments, and next steps.
12:00	Roundtable Close