

**From:** s 22  
**To:** s 47F  
**Cc:** [Paul Schroder](#)  
**Subject:** RE: Paul Schroder & Minister Stephen Jones [SEC=OFFICIAL]  
**Date:** Thursday, 28 September 2023 10:59:09 AM  
**Attachments:** [image001.png](#)

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**OFFICIAL**

Hi s 47F

I hope you're doing well and thanks for sending this through.

Could we please reduce the length of the meeting to 45 minutes – the Assistant Treasurer has another commitment at 4 pm.

At this stage, I'm unsure who will be travelling to Melbourne with him but will let you know as soon as I do.

Thanks again,

s 22

s 22 **Executive Assistant**

Office of the Hon Stephen Jones MP  
Assistant Treasurer | Minister for Financial Services | Member for Whitlam

M s 22

*I acknowledge the Dhawaral, Gundungurra, Ngunnawal and Ngambri people, the First Peoples of Illawarra, Southern Highlands and Canberra where I live and work. I respect and acknowledge their Elders, past and present.*

**OFFICIAL**

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

**From:** Paul Schroder s 47F  
**Sent:** Thursday, 28 September 2023 10:49 AM  
**To:** 30.33 (8P) Meet; s 22  
**Cc:** s 47F  
**Subject:** Paul Schroder & Minister Stephen Jones  
**When:** Wednesday, 11 October 2023 3:00 PM-4:00 PM (UTC+10:00) Canberra, Melbourne, Sydney.  
**Where:** AustralianSuper s 47G(1)(a)

Dear s 22

We look forward to seeing Minister Jones, could you please let me know full names of attendees who may be accompanying the Minister?

Details as to how to access our building are below.

Kind regards,

s 47F

s 47G(1)(a)

s 47G(1)(a)

s 47G(1)(a)

*Please ask for Paul Schroder or myself on arrival.*

s 47F

Executive Assistant to Paul Schroder - Chief Executive s 22

s 47F

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**From:** Paul Schroder  
**To:** s 47G(1)(a) s 22  
**Cc:** s 47F s 22  
**Subject:** Paul Schroder & Minister Stephen Jones  
**Attachments:** image001.png  
s 22

Meeting moved earlier per the Minister's schedule

Dear s 22

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australiansuper.com <<http://www.australiansuper.com/>>

s 47G(1)(a)

s 47G(1)(a)

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**From:** s 47G(1)  
**To:** s 47F  
**Cc:** s 47G(1)(a)  
**Subject:** Registration of visitor s 47G(1)(a)  
**Date:** Friday, 6 October 2023 1:15:59 PM

---

Registration of visitor s 47G(1)  
(a)

Dear s 47F

Thank you for registering your visitor(s), the details are:

Meeting Host : s 47F  
Meeting Date : 11/10/2023  
Meeting Time : 11:30 AM  
Meeting Location : Melbourne  
s 47G(1)(a)

Visitors Company : Treasury  
Visitor Names : Minister Stephen Jones  
s 22

If any of these details change, please contact Reception at your earliest convenience, you can also access or update your request via the Facilities Portal, your reference is s 47G(1)  
(a).

Thank you

Facilities Management Team  
s 47G(1)(a)

s 47G(1)(a)

**From:** [Paul Schroder](#)  
**To:** § 47G(1)(a); § 22  
**Cc:** § 47F  
**Subject:** Paul Schroder & Minister Stephen Jones  
**Attachments:** [image001.png](#)

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§ 47G(1)(a)

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s 22

**From:** s 22 <[REDACTED]@TREASURY.GOV.AU>  
**Sent:** Thursday, September 28, 2023 10:59:05 AM  
**To:** s 47F <[REDACTED]@australiansuper.com>  
**Cc:** Paul Schroder <s 47F [REDACTED]>  
**Subject:** RE: Paul Schroder & Minister Stephen Jones [SEC=OFFICIAL]

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**From:** [Wayne Swan](#)  
**To:** s 22  
**Subject:** Important Announcement  
**Date:** Tuesday, 13 June 2023 6:17:46 PM  
**Attachments:** [image001.png](#)  
[230613 Cbus Super media release - leadership announcement\\_FINAL.pdf](#)

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Dear s 22,

Further to our phone conversation earlier, I am writing to advise you of the appointment of Kristian Fok as the new permanent chief executive officer of Cbus Super.

The board has also appointed current Chief Member Officer Marianne Walker to the newly created role of deputy chief executive officer.

Please find attached, a statement released by Cbus announcing the new appointments.

As you may be aware, Mr Fok has been the fund's Chief Investment Officer for the last decade and had a close association with the fund as an asset consultant for a decade before that. He is well known by many members, partners and stakeholders, and as chair of the Australian Sustainable Finance Institute across government as well.

Mr Fok's immediate focusses will be on expanding the fund's focus on retirement and improving services for members.

Yours sincerely

Wayne



**Wayne Swan**

Chair  
Level 22, 130 Lonsdale Street  
Melbourne VIC 3000  
s 47F  
[www.cbussuper.com.au](http://www.cbussuper.com.au)

Cbus Trustee: United Super Pty Ltd ABN 46 006 261 623 AFSL 233792 Cbus ABN 75 493 363 262

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12 June 2023

## **MEDIA RELEASE**

### **Cbus Super leadership appointments: Kristian Fok appointed CEO and Marianne Walker Deputy CEO**

Cbus Super is pleased to announce that Kristian Fok has been appointed Cbus Chief Executive Officer and Marianne Walker Deputy CEO following a competitive recruitment process.

Mr Fok has been the fund's Chief Investment Officer (CIO) for the last decade and had a close association with the fund as an asset consultant for a decade before that. Ms Walker has been a Cbus executive since 2019 and is also the fund's Chief Member Officer, joining the fund from Victoria's Department of Health and Human Services where she had been Executive Director of Customer Support.

As CIO, Kristian led the development and implementation of Cbus' hybrid internalisation strategy, which has seen the management of 38% of the fund's assets brought in-house and total cumulative costs savings for members of over \$500 million.

Cbus Chair Wayne Swan said the appointments of Mr Fok and Ms Walker strengthen the fund's leadership at an important transition point for the super industry.

"Kristian has put Cbus' investment team at the leading edge of pension funds around the world and we are excited that he will now devote his considerable abilities to the wider leadership of the fund," Mr Swan said.

"He innately understands the fund, its heritage, and our connection to the built environment sector.

"Kristian is devoted to the profit-to-member model that underpins industry super funds and the Board looks forward to working with him to continue delivering for members."

Mr Swan added, "Likewise, Marianne brings a genuine and no-nonsense member first attitude to her work.

"Administering superannuation funds has increased in complexity as funds have expanded, and Marianne carries a fierce determination to cut through barriers and deliver the best possible services for our 900,000 members, now and into the future.

"She calls a spade a spade and what you see is what you get. Our members and sponsoring organisations appreciate that."

Mr Swan said Mr Fok and Ms Walkers' immediate focus would be expanding the fund's offering on retirement and improving services for members.

"For forty years Cbus has been hugely successful at building members' account balances," Mr Swan said.

"Our challenge now is to make sure we deliver members the best possible retirement experience and we are confident we have the right leaders for that task."

Mr Fok has been Acting CEO since the retirement of Justin Arter in May.

**ENDS**

**Media enquiries:** Tristan Douglas, 0417 736 434, email: [tristan.douglas@cbussuper.com.au](mailto:tristan.douglas@cbussuper.com.au)



## **Background information:**

### **Kristian Fok bio**

Prior to his appointment as Cbus Super CEO Kristian Fok served as the Fund's Chief Investment Officer (CIO) for 10 years. As CIO, Kristian was responsible for leading the Cbus investment strategy and worked closely with the Investment Committee of the Board. This included evaluating the market and investment opportunities that provide returns to members over the long term, managing investment governance and risk, implementing the investment strategy and monitoring the portfolio. Kristian led the development and implementation of Cbus' hybrid internalisation strategy, which has seen the management of 38% of fund assets brought in-house and total cumulative costs savings for members of over \$500 million.

Kristian also serves on the Board of the Australian Council of Superannuation Investors and is Chair of the Australian Sustainable Finance Institute. Kristian's qualifications include Bachelor of Commerce, Fellow of the Institute of Actuaries Australia and Fellow of FINSIA.

### **Marianne Walker bio**

In addition to her appointment as Cbus Super Deputy CEO, Marianne Walker is the Chief Member Officer, having joined the fund in 2019 to lead the member and employer experience division which supports services for our 900,000 members. Marianne is a dedicated advocate driving change to deliver better quality retirement outcomes for Cbus members and their unique needs.

Prior to joining Cbus, Marianne was the Executive Director of Customer Support at the Victorian Department of Health and Human Services and has provided executive leadership for over two decades in industries including finance, logistics, utilities, energy and banking. She is respected for steering organizations through successful transformation, driving business and commercial performance.

She is also a Board Director of The Royal Women's Hospital in Victoria.

Cbus is the leading Industry Super Fund representing those that help build and maintain Australia. As one of Australia's largest super funds, we provide superannuation and income stream accounts to more than 900,000 members and we manage more than \$80 billion of our members' money (as at 12 May 2023). Our members include workers and retirees, their families and employers. As of April 2022, Cbus merged with Media Super and offers Media Super products. In May 2023 Cbus Super successfully completed its merger with EISS Super, welcoming 17,000 new members and establishing itself as the leading fund for energy and electrical workers in Australia.

Issued 12 June 2023, United Super Pty Ltd ABN 46 006 261 623 AFSL 233792 as trustee for Construction and Building Unions Superannuation Fund (Cbus Super/Cbus) ABN 75 493 363 262.