

## MEDIA RELEASE

# Liquidity Chief Joins La Trobe Financial to Support AUM Growth

**Melbourne, Australia – 6 October 2025**

La Trobe Financial, Australia's premier alternative asset manager, has appointed Dan Baker as Chief Liquidity Officer, further strengthening its executive team as the firm accelerates toward its strategic goal of \$55 billion in assets under management by 2030.

Baker joins La Trobe Financial with over two decades of experience in liquidity, treasury, and market risk, having held senior roles at NAB, AustralianSuper, ME Bank, Suncorp, and most recently as Treasurer at Bank First. His appointment follows a series of strategic hires – including Travis Goudie (Deputy CFO), James Waterworth (Head of Distribution), and David Tagg (Head of Investments) – as the firm deepens its leadership bench to support its expanding global investment platform.

"Liquidity is the backbone of investor confidence," said Baker. "La Trobe Financial's disciplined approach to liquidity management is a key reason it has earned the trust of over 120,000 investors<sup>^</sup>. I'm thrilled to contribute to a business that's not only growing rapidly but doing so with integrity and purpose."

La Trobe Financial currently manages \$21 billion in AUM, including its flagship La Trobe Australian Credit Fund, which at nearly \$14 billion, is the largest retail credit fund in Australia. The firm launched its US Private Credit Fund in partnership with Morgan Stanley in 2023 and will shortly introduce Australian Commercial Real Estate and Global Infrastructure strategies as it delivers a broader product suite for retirement-focussed investors.

**Chris Paton, Chief Investment Officer, commented:** "Dan's appointment reflects our commitment to building a resilient, high-performing team with deep industry experience. His expertise in liquidity and risk complements our investment strategy and our careful stewardship of investor capital. His appointment positions us well for the next phase of growth."

The appointment reinforces La Trobe Financial's commitment to operational excellence and investor stewardship, as the firm scales to meet strong inflows from investors seeking dependable, enhanced income solutions.

To find out more visit [www.latrobefinancial.com.au](http://www.latrobefinancial.com.au)

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### About La Trobe Financial

La Trobe Financial is Australia's premier alternative asset manager and a proven and trusted investment partner for institutional and retail investors with A\$21 billion AUM. Established in 1952, La Trobe Financial has been building the wealth of its investors across seven decades through careful attention to quality, discipline and consistent performance across the economic cycle.

Today, La Trobe Financial manages assets on behalf of over 120,000 investors<sup>^</sup> – including some of the world's largest financial institutions – and 4,700 supporting financial advisers.

La Trobe Financial's retail asset management business is spearheaded by the c.\$14bn La Trobe Australian Credit Fund, the largest retail credit fund across Australia. Its flagship 12 Month Term

Account has been recognised as “Best Credit Fund – Mortgages” for 16 consecutive years by *Money* magazine and is consistently recognised as one of Australia’s fastest growing funds (per Rainmaker) across the Australian wealth management industry\*.

To find out more visit [www.latrobefinancial.com.au](http://www.latrobefinancial.com.au)

#### **Disclaimer**

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Past performance is not a reliable indicator of future performance.

<sup>^</sup>Total investors is calculated by adding all individual & joint investors (which includes some investors with a current zero balance in their account) to reasonable estimates of investors investing via platform, trusts or SMSFs.

\* To view our Awards please visit the Awards and Ratings page on our website.